

## **Membership Overview**

Benefits & Other Resources to Help Your Nonprofit Succeed



## (Y)our Membership Team



Emily Gross
Director, Client Engagement
(703) 674-5343
egross@charities.org



Jennifer Watkins
Client Engagement Coordinator
(703) 674-5375
jwatkins@charities.org



Brittney Campanella
Client Engagement Coordinator
(703) 674-5363
bcampanella@charities.org













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



Courtney Marx
Assistant Coordinator
(703) 674-5347
cmarx@charities.org



Lindsay Kosa
Campaign Representative
(703) 674-5366
Ikosa@charities.org

## General Contact Information: ClientSolutions@charities.org (703) 674-4953















#### **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).









#### 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"







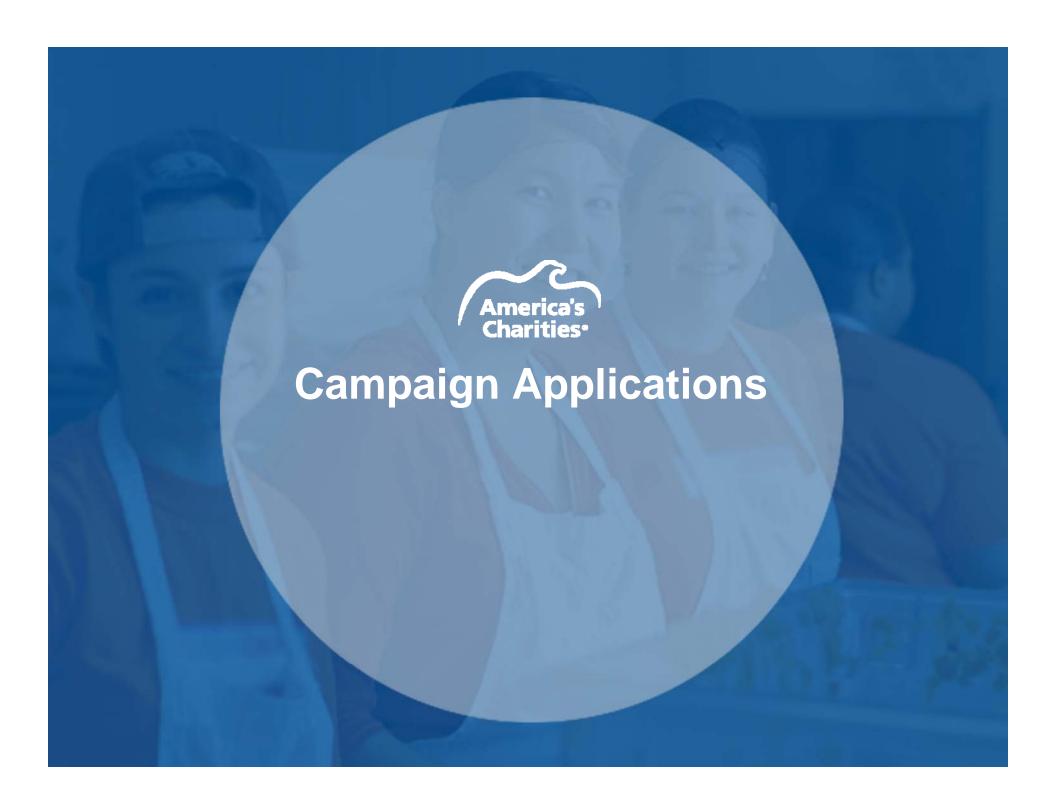




## **Member Benefits**

3

- 1 Campaign Applications
  - 2 Marketing Your Nonprofit
    - Funds Allocation, Distribution and Reporting
      - **Sharing Best Practices**





### **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







- 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 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













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









- 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





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#### **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

















#### www.charities.org

 Go to <u>www.charities.org/user</u> 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.

| America's Charit | ies® Find a Charity            | Cause Funds        | Solutions         | Resources | News & Blog | About |
|------------------|--------------------------------|--------------------|-------------------|-----------|-------------|-------|
| User accour      | _                              |                    |                   |           |             |       |
|                  | Create new account Log in      | Request new pas    | swora             |           |             |       |
|                  | E-mail * acdemo1 Enter your e- | mail address.      |                   |           |             |       |
|                  | Password *  Enter the pas      | sword that accompa | nies your e-mail. |           |             |       |
|                  | Log in                         |                    |                   |           |             |       |











### **Report Types**





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







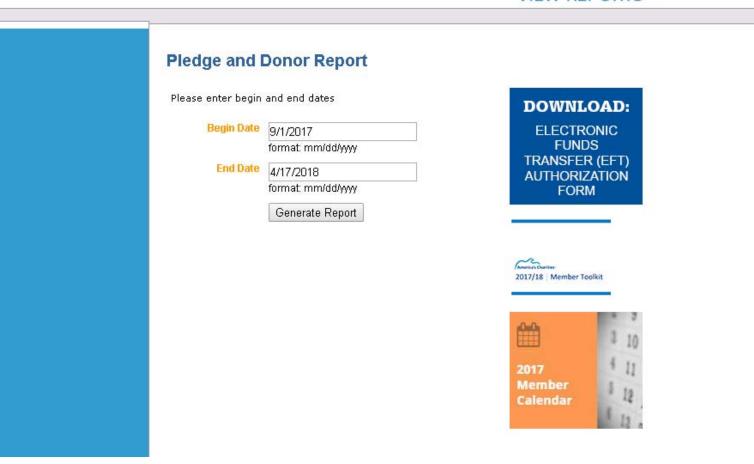




## **#1. Pledge and Donor Report**



#### **VIEW REPORTS**









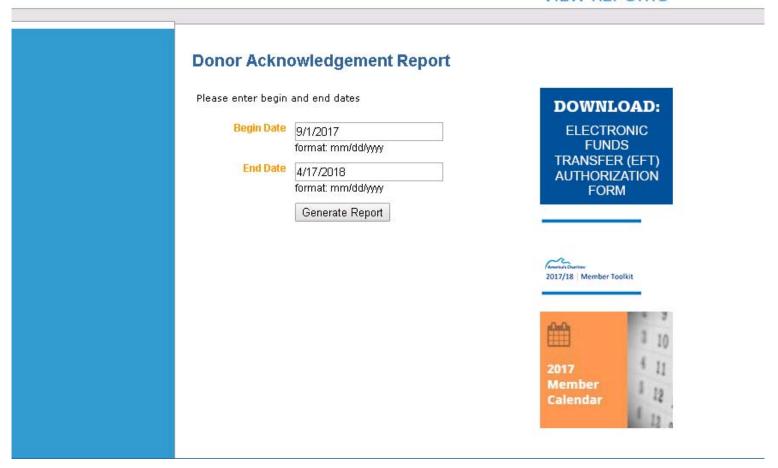




### **#5. Donor Acknowledgement Report**



#### **VIEW REPORTS**















## **#5. Donor Acknowledgement Report - SAMPLE**

| Date     | V    | <b>T</b> | O                  | Amount   | Thank | First   | Last    | En 4-11       | Nistan      | 0 -1-1   | 0:1-   |
|----------|------|----------|--------------------|----------|-------|---------|---------|---------------|-------------|----------|--------|
| Added    | Year | Туре     | Campaign Name      | Pledged  | You   | Name    | Name    | EMail         | Notes       | Address  | City   |
|          |      |          | CFC- National      |          |       |         |         |               |             | 358 N    |        |
| 04/02/11 | 2010 | CFC      | Capital Area       | N/A      | Yes   | Richard | Nixon   |               |             | Beach Ct | Orange |
|          |      |          | CFC- National      |          |       |         |         |               |             |          |        |
|          |      |          | Capital Area Total | N/A      |       |         |         |               |             |          |        |
|          |      |          |                    |          |       |         |         |               | In honor of |          |        |
| 12/28/10 | 2010 | Pri∨ate  | American Express   | \$250.00 | Yes   | Abigail | Adams   | Abby@aol.com  | Mary        |          |        |
| 12/28/10 | 2010 | Pri∨ate  | American Express   | \$120.00 | Yes   | Andrew  | Jackson |               |             |          |        |
|          |      |          | American Express   |          |       |         |         |               |             |          |        |
|          |      |          | Total              | \$370.00 |       |         |         |               |             |          |        |
|          |      |          |                    |          |       |         |         |               |             |          |        |
| 03/18/11 | 2010 | Pri∨ate  | UnitedHealth       | \$120.00 | Yes   | Oprah   | Winfrey | oprah@aol.com |             |          |        |
|          |      |          |                    |          |       |         |         |               |             | 908 Oak  |        |
| 03/18/11 | 2010 | Pri∨ate  | UnitedHealth       | \$240.00 | Yes   | Eddie   | Murphy  |               |             | Dri∨e    | Hudson |
|          |      |          |                    |          |       |         |         |               |             |          |        |
|          |      |          | UnitedHealth Total | \$360.00 |       |         |         |               |             |          |        |
|          |      | State/   | Virginia State     |          |       |         |         |               |             | PO Box   |        |
| 05/11/11 | 2010 | Local    | Campaign           | \$320.00 | Yes   | Richard | Gere    |               |             | 5551     | Richmo |
|          |      |          |                    |          |       |         |         |               | Lico for    |          | ·      |





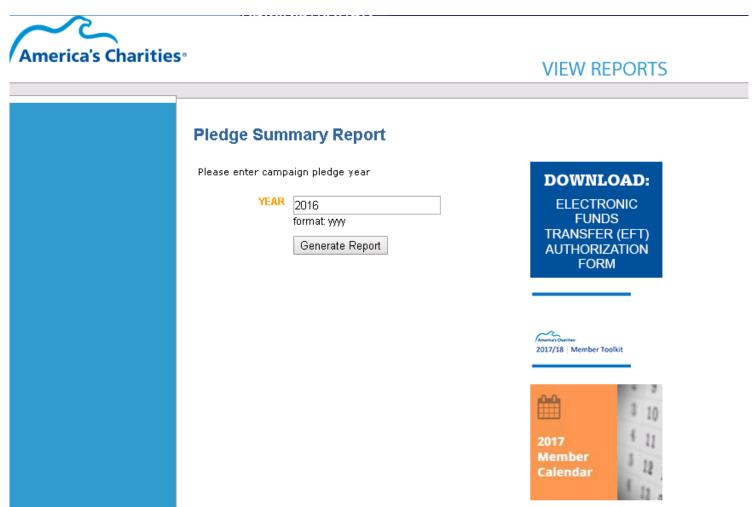








### **#4. Pledge Summary Report**















## **#4. Pledge Summary Report - SAMPLE**

|      | Campaign    |                                  | Amount                 |       |       |
|------|-------------|----------------------------------|------------------------|-------|-------|
| Year | Туре        | Campaign Name                    | 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 | 1           | 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 | 1           | 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             |       |       |
|      |             | Grand Total                      | \$69,760.52            |       |       |











### 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<br>Pledged | Current<br>Payment | Total Paid<br>To Date | Thank<br>You | First<br>Name | Last<br>Name | Address        | City     | St.  | Zip   | EMail    |
|----------------------|-------------------|--------------------|-----------------------|--------------|---------------|--------------|----------------|----------|------|-------|----------|
| oumpaign rumo        | , ioagoa          | , ajiiioiii        | 10 0410               |              | 1101110       | 110.110      | 358 N          | Oity     |      |       |          |
| AARP                 | \$650.00          | \$150.00           | \$500.00              | Yes          | Richard       | Nixon        | Beach Ct       | Orange   | FL   | 32746 |          |
| AARP Total           | \$650.00          | \$150.00           | \$500.00              |              |               |              |                |          |      |       |          |
|                      |                   |                    |                       |              |               |              |                |          |      |       | abby@yah |
| Lockheed Martin      | \$250.00          | \$125.00           | \$125.00              | Yes          | Abigail       | Adams        |                |          |      |       | oo.com   |
| Lockheed Martin      | \$120.00          | \$60.00            | \$60.00               | No           | Andrew        | Jackson      |                |          |      |       |          |
| Lockheed Martin      |                   |                    |                       |              |               |              |                |          |      |       |          |
| Total                | \$370.00          | \$185.00           | \$185.00              |              |               |              |                |          |      |       |          |
| ExxonMobil           | \$120.00          | \$30.00            | \$90.00               | No           | Oprah         | Winfrey      |                |          | WI   |       |          |
| FNahii               | 6040.00           | 660.00             | 6460.00               | V            | Eddia         | Marinahara   | 908 Oak        | Livelege | 14/1 | F4046 |          |
| ExxonMobil           | \$240.00          | \$60.00            | \$160.00              |              | Eddie         | Murphy       | Drive          | Hudson   | WI   | 54016 |          |
| ExxonMobil Total     | \$360.00          | \$90.00            | \$250.00              |              |               |              |                | A.       |      | _     |          |
| Montgomery<br>County | \$360.00          | \$130.00           | \$280.00              | Yes          | Richard       | Gere         | PO Box<br>5551 | Potomac  | MD   | 85702 |          |
| Montgomery           |                   |                    |                       |              |               |              | 3737 E         |          |      |       |          |
| County               | \$480.00          | \$90.00            | \$330.00              | Yes          | Harrison      | Ford         | 38th St        | Olney    | MD   | 85713 |          |
| Montgomery           |                   |                    |                       |              |               |              |                |          |      |       |          |
| County Total         | \$840.00          | \$220.00           | \$610.00              |              |               |              |                |          |      |       |          |
| Grand Total          | \$2,220.00        | \$645.00           | \$1,545.00            | E            |               |              |                |          |      |       |          |











## **#3. Member Distribution Report - SAMPLE**

| Campaign     |  | Amount       | Current     | Total Paid to          |       |       |       |
|--------------|--|--------------|-------------|------------------------|-------|-------|-------|
| Year Type    | Campaign Name  | Pledged      | Payment     | Date City              | State | Zip   | Notes |
| 2009 CFC     | Cheasapeke 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<br>CFC of the National Capital | \$890.00     | \$0.00      | \$520.96 Dothan        | AL    | 36302 |       |
| 2009 CFC     | 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            |       |       |       |
|              | UnitedHealth Group                                   |              |             |                        |       |       |       |
| 2009 Private | 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 |       |
|              | Private Campaigns                                    |              |             |                        |       |       |       |
| 2009         | SUMMARY  | \$7,763.52   | \$708.15    | \$3,331.74             |       |       |       |
| State&       | Combined Virginia                                    |              |             |                        |       |       |       |
| 2009 Local   | Campaigns  | \$2,908.00   | \$268.16    | \$2,296.21 Richmond    | VA    | 23219 |       |
|              | State/Local Campaigns                                | 72,000.00    | 420000      | <del></del>            |       |       |       |
| 2009         | SUMMARY  | \$2,908.00   | \$268.16    | \$2,296.21             |       |       |       |
|              | Grand Total  | \$85,313.52  | \$10,641.31 | \$63,928.72            |       |       |       |
|              | Fees   | (\$5,118.81) | (\$511.00)  | (\$4,088.00)           |       |       |       |
|              | Net Payment  | \$80,194.71  | \$10,130.31 | \$59,840.72            |       |       |       |
|              |  |              |             |                        |       |       |       |











## 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
  - 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 <u>help@charities.org</u>













#### **Snapshot Research**



Download Your Copy Here:

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.



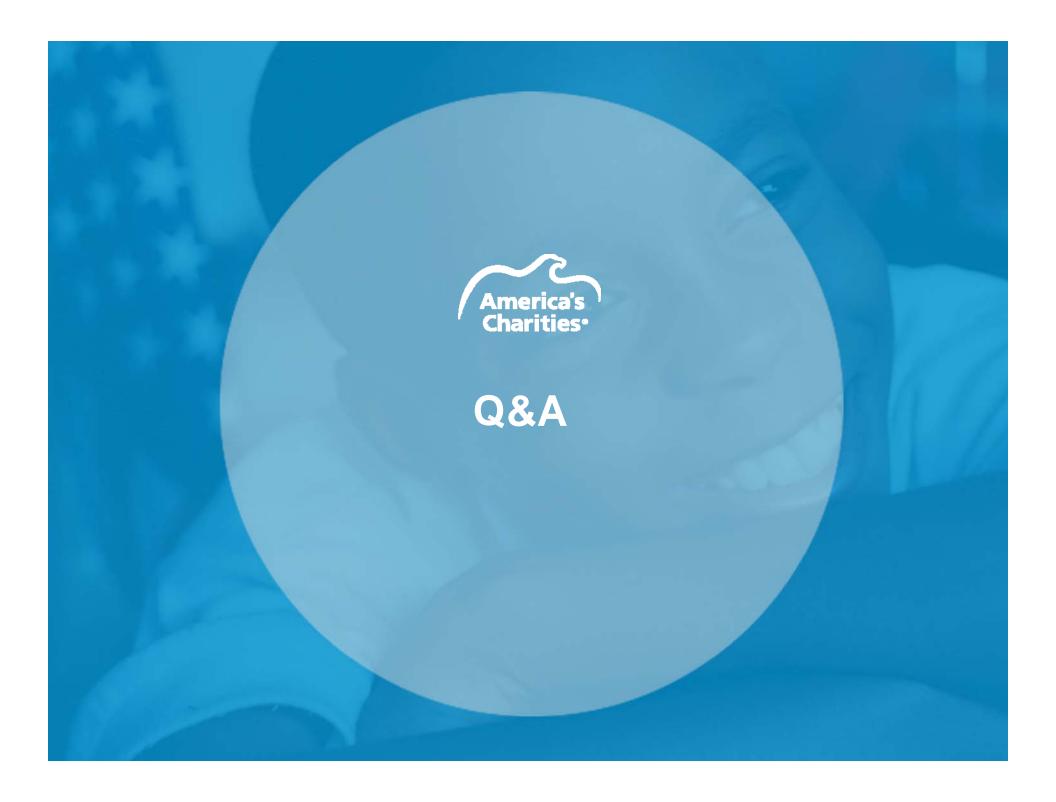












# THANK YOU