



Transformation in Action



2016 Summary Annual Report

Message from Our Leadership

Dear Supporters and Friends,

America's Charities' primary objective has, and always will be, to bring more resources to nonprofits changing our world. Since our inception, we have raised more than \$675 million for more than 10,000 nonprofits by inspiring employees and organizations to support causes they care about through workplace giving programs. The unrestricted, sustainable funds generated from workplace giving programs are critical to empowering nonprofits to operate and pursue their missions effectively.

However, the role of workplace giving has significantly transformed in the last 5-10 years due to a more competitive technology market, evolving workforce demographics, greater expectations around corporate social responsibility (CSR), and the need for more collaborative efforts between public and private sector employers and nonprofits. As the role of workplace giving evolves, so must America's Charities' approach to bringing more resources to nonprofits.

Towards the end of 2015, we explored new solutions and strategies to expand our client base, create new revenue streams for our nonprofit members, and build capacity for our organization. In 2016, we started putting those new solutions and strategies into action – and it has been an incredible transformation to witness.

We expanded our product offering and suite of workplace giving technologies. We restructured our approach to workplace giving administration, charitable funds management, and advisory services. We enhanced our employee engagement techniques and formed new partnerships. By combining our unrivaled understanding of and commitment to the nonprofit sector and CSR expertise with these new approaches and partnerships, we have positioned our clients and members for greater success and social impact year-round.

To our strategic partners, volunteer Board of Directors, dedicated staff, and generous donors – thank you! Our new strategy is working and we greatly value your continued support of our work and commitment to the success of those we serve.



Jim Starr
President and CEO



George Weiner
Board Chairman

Our Impact

raised since inception for



More than
\$675 million



10,000+
nonprofits nationwide

Employers

Employees

Nonprofits

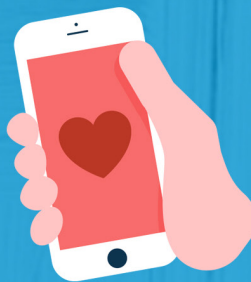


287 public and private
sector funding partners
(CFC, State/Local/Private Sector)

37 employer clients whose
workplace giving
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



275k+ # employees
given the
opportunity to give
through workplace
giving campaigns
we manage



146 nonprofit members
served in 2016

5,459 member &
non-member
nonprofits
supported
in 2016

**\$23
million** funds distributed to
nonprofits in 2016 as
a result of America's
Charities workplace
giving campaigns

“I just wanted to say ‘Thank You’ to America’s Charities! The team was wonderful and so helpful, and in our first year we increased our CFC contributions by over 100%!! I can’t wait to be even more involved through events in 2017!”

Kathy Edwards,
National Down Syndrome Congress





Employee Giving Campaigns

(Funds raised by cause group)



Human Services = \$10.7 million

Children & Youth = \$4 million

Health & Research = \$3.5 million

Education = \$2.7 million

Advocacy & Human Rights = \$1.9 million

Environment & Animals = \$350 thousand

“The campaign strategy from America’s Charities provided the guidance I needed to really optimize our employees’ charitable impact. Now I have a roadmap to make next year’s campaign even more successful!”

John Leonard,
Optimizely



Consolidated Balance Sheet

December 31, 2016

2016

ASSETS

| | |
|--|-------------|
| Cash | \$4,885,235 |
| Promises to give (pledges) | 2,931,392 |
| Member charity fees receivable, net of allowance for doubtful accounts of \$ 49,217 | 560,446 |
| Other receivables..... | 180,740 |
| Other assets | 118,114 |
| Property and equipment, net..... | 121,697 |

Total Assets.....\$8,797,624

LIABILITIES AND NET ASSETS

Liabilities

| | |
|--|-----------|
| Accounts payable and accrued expenses..... | \$385,176 |
| Campaign funds payable to member/nonmember charities.. | 6,597,876 |
| Deferred revenue | 877,442 |
| Deferred rent | 123,987 |

Total liabilities\$7,984,481

Net Assets - Unrestricted

| | |
|-----------------------|---------|
| Undesignated..... | 263,143 |
| Board designated..... | 550,000 |

Total net assets \$813,143

Total Liabilities and Net Assets.....\$8,797,624

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

Consolidated Statement of Activities

Year Ended December 31, 2016

2016

SUPPORT AND REVENUE

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

| | |
|------------------------------------|-------------|
| Combined Federal Campaign..... | \$6,765,119 |
| Campaign management services | 12,584,665 |
| Private sector | 1,673,845 |
| State and local | 2,022,628 |

Total net amounts raised in campaigns 23,046,257

Less amounts raised on behalf of others..... 22,610,743

Support designated to America's Charities and Affiliates..... 435,514

| | |
|---------------------------------|-----------|
| Member charity fees..... | 2,339,179 |
| Campaign management fees | 653,917 |
| Donated services | 992,569 |
| Campaign advertising fees | 203,350 |
| Other..... | 75,483 |

Total Support and Revenue.....\$4,700,012

EXPENSES

Program services

| | |
|------------------------------------|-----------|
| Member campaign services..... | 2,110,942 |
| Campaign management services | 1,774,595 |

Total program services\$3,885,537

Supporting services

| | |
|------------------------------|---------|
| Management and general | 810,450 |
| Fundraising..... | 474,908 |

Total supporting services\$1,285,358

Total expenses.....\$5,170,895

Change in net assets

Net Assets

| | |
|-----------------|-----------|
| Beginning | 1,284,026 |
| Ending..... | \$813,143 |

Advancing CSR & Engaging More Employees in Giving

Expanding our Suite of Employee Giving Solutions

Since 1980, America's Charities has been at the forefront of workplace giving's transformation – and we have proudly continued that tradition by adding new technologies and innovative giving solutions to our mix of product offerings. For employers who have a technology solution but need a strategic partner, we offer the flexibility of stand-alone services and expertise, including reporting, charity vetting, funds collection and distribution, matching gift programs, donor receipting, and CSR strategy. In 2015, we rolled out America's Charities powered by Causecast solution, which supports companies' CSR objectives more holistically by engaging employees through workplace giving as well as peer-to-peer fundraising, volunteering, volunteer grants, in-kind giving, storytelling, and international giving.

To expand our client base in 2016 and meet the needs of employers that require a giving-only solution, we introduced America's Charities' Simply Giving solution powered by StratusLive. With the addition of this platform to our [comprehensive suite of employee giving solutions](#), we can empower more employers of all budgets and sizes and their employees to support their communities and the causes they care about, generating more sustainable resources for the nonprofits changing our world.

“With the addition of our new, Simply Giving Solution, we're blazing the trail for any employer—regardless of size, budget or bandwidth—to make a real difference in the lives of their employees and communities.”

Jim Starr

President and CEO,
America's Charities

Expanding and Diversifying Our Clientele Base

“We’re delighted to partner with America’s Charities for the 2016 Maryland Charity Campaign. I am confident our partnership will greatly benefit communities statewide.”

John Wobensmith
Secretary of State, Maryland

America’s Charities Selected to Manage the 2016 Maryland Charity Campaign

In July 2016, Maryland Secretary of State John Wobensmith announced that America’s Charities was selected as the 2016 contractor for the State’s Maryland Charity Campaign (MCC), an effort that helps State employees and retirees contribute to nearly 1,000 charities. Through the 2016 MCC, America’s Charities helped raise more than \$2.9 million for 900 nonprofits that supported the welfare of Marylanders in the form of providing food, shelter, healthcare, and mental health services to the poor, homeless, and those suffering from addiction, in addition to supporting the arts, faith-based initiatives, and much more. [READ MORE.](#)



Maximizing Social Impact

Disaster Philanthropy

To help donors have a greater, long-term impact on the outcome of major disasters, we launched the America's Charities Disaster Recovery Fund presented by Center for Disaster Philanthropy in May 2016. Through this partnership, America's Charities enables immediate donor support by setting up donation pages specific to the disaster at hand through our [charities.org website](https://www.charities.org), through direct corporate contributions, as well as through workplace giving campaigns (the Fund can be made available on any employee giving platform). As we collect donations, the Center for Disaster Philanthropy (CDP), an organization that provides timely and thoughtful strategies to increase donors' impact during domestic and international disasters, assesses the medium and long-term needs of communities impacted by the disaster and identifies the appropriate nonprofits who should receive the donations. After 90 days of collecting donations for the disaster, America's Charities processes and distributes the funds in compliance with CDP's recommendation.

America's Charities' partnership with CDP is intended to enhance relationships with donors by providing them with specific information as to how their contributions assisted the needs of an impacted community for long-term rehabilitation. [Click here](#) to read more about this partnership and see how the Fund has supported the Baton Rouge Food Bank in wake of the Louisiana Floods and The Salvation Army – Durham after Hurricane Matthew made landfall.

“If we can capture donors' immediate attention while focusing on long-term recovery efforts, we can help donors spend their money more wisely, improve the lives of people in need, and collectively increase social impact.”

Bob Ottenhoff
President and CEO,
Center for Disaster Philanthropy

Empowering Nonprofits & Employers Through Education

A firm believer in the power of education, training, and sharing resources, America's Charities assists nonprofits and employers in developing and maximizing community impact, fundraising, and employee donor engagement through webinars, events, and a library of free white papers, guides, and toolkits.

In 2016, America's Charities hosted, co-hosted, and presented at 14 webinars and events, and produced five free white papers, guides, and toolkits, including:

- [2016 Charities@Work Best Practices Summit on Employee Engagement in Corporate Citizenship](#)
- [+IMPACT 2016 Conference: Innovating for the Future](#)
- [America's Charities 2016 Membership Assembly](#)
- [NetworkPeninsula Annual Impact Forum: Employee Engagement & Social Impact](#)
- [Best Practices for Employee Giving Programs](#)
- [Employee Engagement that Sticks: Attract and Retain Top Talent](#)
- [Strategic Volunteerism](#)
- [Five Recommendations for Meeting Employee Demands and Social Impact Goals - Snapshot 2015 Research and Best Practices](#)
- [Drive Nonprofit Success with Google Analytics Intel](#)
- [The Chemistry of Employee Donor Cultivation: Turning Your Year-End Fundraising Efforts into Year-Round Donor Engagement](#)
- [Powerful Metrics & Methods for Measuring Effective Social Impact](#)
- [Exceptional Storytelling Made Easy](#)
- [Building Buy-in From Leadership](#)
- [5 Key Steps to Starting an Employee Volunteer Program](#)

Bringing More Value to Nonprofit Members

Partnerships with COGENCY GLOBAL, Double the Donation, and Whole Whale

Beyond the reduced administrative costs and unrestricted, sustainable funds generated for our nonprofit members through workplace giving campaigns, America's Charities members also benefited from a variety of exclusive discounts and savings through three new partnerships formed by America's Charities in 2016.

COGENCY GLOBAL, Inc.

Formerly known as National Corporate Research, Ltd. (NCR), COGENCY GLOBAL provides nationwide and international corporate, secured transactions, business license, real property, court, agency, and library services for all industries, including the nonprofit sector. In addition to reducing administrative workload for our nonprofit members, the partnership brought our members several opportunities, including discounts on their Charity Registration and Sales Tax Exemption Services and the State Corporate Compliance. Our nonprofit members also benefitted from access to COGENCY's "white glove" charitable registration compliance service that ensures all nonprofit reports, renewals, extensions, and exemptions are properly filed on time with exceptional service specialists. [READ MORE.](#)

"We are thrilled to offer these discounts to America's Charities' roster of nonprofit members, some of the most trusted, respected and highest-performing in the nation. We really want to reduce this administrative workload for nonprofits, which will allow them to focus on their missions. This is a huge step forward in achieving that goal."

Ronald J. Barrett

Vice President of Nonprofit Services
COGENCY GLOBAL, Inc.

Bringing More Value to Nonprofits

Double the Donation

Between \$6-10 billion in matching gift funds go unclaimed each year, mostly because donors aren't aware their employers offer this incredible employee giving incentive. Double the Donation addresses this problem by providing nonprofits with the tools they need to raise matching gift awareness and making it easy for donors to submit matching gift requests, thereby helping nonprofits raise more money. Through America's Charities' partnership with Double the Donation, our nonprofit members are able to access Double the Donation's matching gift tools for free or at a reduced rate, saving our members anywhere from \$499 to \$1,000 annually. [READ MORE.](#)

Whole Whale

The Whole Whale strategy is about looking at a nonprofit's existing resources and asking "What else can this do for us"? By asking, "What do the data say?" Whole Whale capitalizes on existing resources and builds a "Data Culture" within every organization with whom they work. They take a holistic approach and tailor their services to the unique needs of each client. Whether that's data analysis, digital strategy, web development, or training, Whole Whale helps nonprofits reach their goals and build their own capacity. Through America's Charities' partnership with Whole Whale, our nonprofit members can take advantage of free educational and digital training courses provided by Whole Whale, valued at \$450. [READ MORE.](#)

"The key benefit of membership to America's Charities is that it has bolstered our organization's capacity with an additional level of meaningful donor resources."

America's Charities member

2016 Nonprofit Members

America's Charities

100 Black Men of America
 Alzheimer's Disease Research
 American Brain Foundation*
 American Campaign for Prevention of Child Abuse and Family Violence
 American Center for Law and Justice
 American Civil Liberties Union Foundation
 Amnesty International USA
 Asian American Legal Defense and Education Fund
 Barbara Bush Foundation for Family Literacy, Inc.
 Boy Scouts of America
 Canine Partners For Life
 Christian Appalachian Project
 Conservation Fund, The
 Diabetes Research and Wellness Foundation
 Distributive Education Clubs of America Inc. ¥
 Down Syndrome Congress, National
 Dress for Success Worldwide
 Feed the Children
 Feeding America
 FIRST Inspires ¥
 Foster Care To Success Foundation
 Gay, Lesbian, Bisexual & Transgender Scholarship Fund – Point Foundation
 Goodwill Industries International, Inc.
 Human Rights Campaign Foundation
 Latino Youth Education Fund
 Meals On Wheels Association of America
 Mesothelioma Applied Research Foundation ¥
 Morris Animal Foundation
 Mothers Against Drunk Driving
 NAACP Legal Defense and Educational Fund
 NAACP Special Contribution Fund
 National Association of the Deaf
 National Fallen Firefighters Foundation ¥
 National Law Enforcement Officers Memorial Fund
 National Trust for Historic Preservation in the United States
 Native American Rights Fund
 PetSmart Charities
 Physicians for Human Rights
 Population Connection
 Rails-to-Trails Conservancy
 Southern Poverty Law Center
 TechnoServe
 Thurgood Marshall College Fund
 Vera Institute of Justice
 Wounded Warrior Project**
 YWCA USA ¥

Children First - America's Charities

ACTION for Child Protection
 Campaign for Tobacco-Free Kids
 Camp Fire National Headquarters
 Cancer Research for Children – CureSearch
 Children's Hospital
 Children's Leukemia Research Association
 Children's Miracle Network Hospitals
 Children's Rights
 Dream Factory, Inc.
 Father Flanagan's Boys' Home
 Fellowship of Christian Athletes
 Give Kids The World
 The Hole In The Wall Gang Fund
 "I Have A Dream" Foundation®
 Junior Achievement USA
 Make-A-Wish Foundation® of America
 National Black Child Development Institute
 Partnership for a Healthier America ¥
 Prevent Child Abuse America
 Reading Is Fundamental, Inc. (RIF)
 Ronald McDonald House Charities®
 Share Our Strength
 SIDS Alliance/First Candle
 STANDUP FOR KIDS
 Starlight Children's Foundation
 Teach For America ¥
 Tiger Woods Foundation
 UnitedHealthcare Children's Foundation

*State and Local and Private Sector Campaign Participant

**State and Local Campaign Participant

¥ Private Sector Campaign Participant

2016 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.
 Dystrophic Epidermolysis Bullosa Research
 Association of America
 Food Allergy Research & Education, Inc.
 Foundation for the National Institutes of Health
 International Planned Parenthood Federation,
 Western Hemisphere Region
 The LIVESTRONG Foundation
 Melanoma Research Foundation
 The Marfan Foundation
 Memorial Sloan-Kettering Cancer Center
 Multiple Sclerosis Association of America
 NARAL Pro-Choice America Foundation
 National Down Syndrome Society
 Orbis International
 Ovarian Cancer National Alliance
 Ovarian Cancer Research Fund Alliance
 Tuberous Sclerosis Alliance
 United Cerebral Palsy
 Young Survival Coalition ¥

Community First - America's Charities of Greater Washington, D.C.

A Wider Circle
 Arlington Housing Corporation (AHC Inc.)
 Arts and Humanities Council of Montgomery County
 Boy Scouts of America, National Capital Area Council
 Breast Care for Washington
 Capital Caring
 Catholic Charities of the Diocese of Arlington, Inc.
 The Child & Family Network Centers
 The Children's Inn At NIH
 Duke Ellington School of the Arts
 Fairfax CASA
 Food for Others, Inc.
 Good Shepherd Housing & Family Services
 Habitat for Humanity of Northern Virginia, Inc.
 Habitat for Humanity of Washington, D.C.
 Hope Connections for Cancer Support
 House of Ruth
 IDEA Public Charter School
 Lorton Community Action Center (LCAC)
 Lydia's House in Southeast
 Make-A-Wish Foundation® of the Mid-Atlantic
 Miriam's Kitchen
 Montgomery Hospice, Inc.
 Navy Marine Coast Guard Residence Foundation
 Rebuilding Together Alexandria
 Ronald McDonald House Charities® of Greater
 Washington D.C.
 ServiceSource
 Shepherd's Table, The
 Signature Theatre, Inc.
 WAMU 88.5 American University Radio
 WETA (Greater Washington Educational Telecom-
 munications Association)
 YMCA of Metropolitan Washington
 Youth For Tomorrow - New Life Center, Inc.

*State and Local and Private Sector Campaign Participant

**State and Local Campaign Participant

¥ Private Sector Campaign Participant

2016 Local Nonprofit Members

Eligible to participate in state and local government employees' campaigns in their home state, as well as private sector campaigns at the discretion of the employer.

A Gift for Teaching – FL
AIDS Fund – PA
American Red Cross of Central and South
Texas - TX
Animal Trustees of Austin – TX
Breast Cancer Resource Centers of Texas – TX
Caring for Children Foundation of Texas, Inc. – TX
Christian HELP Foundation – FL
Connecticut Food Bank – CT
Freedom Guide Dogs for the Blind – NY
Junior Achievement of New York – NY
New Hope for Kids – FL
PAWS Atlanta – GA
Pennsylvania Coalition Against Domestic
Violence – PA
Pet Alliance Orlando – FL
Time Out Youth, Inc. – NC
VSA Arts of Texas – TX
WOMEN'S WAY – PA

2016 Board of Directors

America's Charities Board

Marcia Bullard,

Chairman (until June 2016)
Immediate Past Chair (as of June 2016)
Consultant

George Weiner

Chairman (as of June 2016)
Founder & CEO, Whole Whale

Erline Belton

Vice Chairman (until June 2016)
Director (as of June 2016)
CEO, Lyceum Group

Joi Gordon

Secretary (until June 2016)
Director (as of June 2016)
CEO, Dress for Success Worldwide

Patrick R. Gaston

Secretary (as of June 2016)
President, Western Union Foundation

Robert J. Dunfey, Jr.

Treasurer (until June 2016)
Consultant

Janet Gibbs

Treasurer (as of June 2016)
President & CEO, Mission Accomplished

Jon Carson (until May 2016)**Brad Farmer**

Assistant Chief Scout Executive- Development,
Boy Scouts of America

Matthew Kaudy

Chief Marketing Officer, EECU Credit Union

Perla Ni (until September 2016)

CEO, Great Nonprofits

David G. Phillips

President, Custom Development Solutions

Charles Rhoads (until May 2016)

Partner, Lowry Rhoads Associates

Laura Thrall

CEO, Cancer Research for Children - CureSearch

Greg Borkowski

Senior Associate Director,
Northwestern University

Michael J. Coburn

Executive Vice President & COO,
Research! America

Stacy Pagos Haller

President & CEO, BrightFocus Foundation

George Sifakis

Chief Executive Officer, Axela LLC

Randall N. Toure

Principal, Strategies 4 Tomorrow

Heather Lofkin Wright

US Corporate Responsibility Director
PricewaterhouseCoopers LLP

Steve Delfin

Non-Voting Director (until June 2016)
America's Charities President & CEO (until June 2016)

James E. Starr

Non-Voting Director (as of June 2016)
America's Charities President & CEO

2016 Board of Directors

Children First

Stacy Pagos Haller

Chairman (until June 2016)
President & CEO, BrightFocus Foundation

Greg Borkowski

Secretary (until June 2016)
Chairman (as of June 2016)
Senior Associate Director,
Northwestern University

Randall N. Toure

Treasurer (until June 2016)
Principal, Strategies 4 Tomorrow

David G. Phillips

Secretary/Treasurer (as of June 2016)
President, Custom Development Solutions

David A. Williams (until September 2016)

President & Chief Executive Officer,
Make-A-Wish Foundation® of America

Heather Lofkin Wright (as of August 2016)

US Corporate Responsibility Director,
PricewaterhouseCoopers LLP

James E. Starr (as of August 2016)

America's Charities President & CEO

Health First

Michael J. Coburn

Chairman (until June 2016)
Executive Vice President & COO,
Research! America

Heather Lofkin Wright

Secretary/Treasurer (until June 2016)
Chairman (as of June 2016)
US Corporate Responsibility Director,
PricewaterhouseCoopers LLP

David G. Phillips

Secretary/Treasurer (as of September 2016)
President, Custom Development Solutions

Paul T. Burke

Director (until June 2016)
Secretary (June – September)
Executive Director & CEO,
American Psychiatric Foundation

George Sifakis

Director (until June 2016)
Treasurer (June – September)
Chief Executive Officer, Axela LLC

Greg Borkowski (as of September 2016)

Senior Associate Director,
Northwestern University

James E. Starr (as of June 2016)

America's Charities President & CEO (as of
November 2016)

Community First

Walt Gillette

Chairman

Emily Simone

Vice Chairman (until August 2016)
Secretary (as of August 2016)

Janet Samuelson,

Secretary/Treasurer (until August 2016)
Treasurer (as of August 2016)
President and CEO, ServiceSource

Tracye Funn

Manager of Corporate Contributions,
Washington Gas

Marc Johnson

Director of Digital Strategy,
StudioOnline Division of APCO Worldwide

Rama G. Latin

Charitable Campaign Administrator,
Department of Navy

James E. Starr (as of August 2016)

America's Charities President & CEO

Senior Executive Team

Stephen M. Delfin

President and Chief Executive Officer (2009-June 2016)

James E. Starr

President and Chief Executive Officer (November 2016 - Present)

Interim President and Chief Executive Officer (June 2016 - November 2016)

Chief Operating Officer and Chief Business Development Officer (March 2015 - June 2016)

Barbara Funnell

Administrative Director

David Stathis

Director, Information Technology

Denise Gustafson

Vice President, Charitable Funds Management Solutions

Kimberly H. Young

Vice President, Business Development

Lindsay J.K. Nichols

Vice President, Marketing and Communications

Robyn Neal

Vice President, Client Engagement Solutions

Sook Suragiat, CPA

Controller, Finance

Auditors

Independently Audited by: RSM US, LLP

Who We Are and What We Do:

America's Charities inspires employees and organizations to support causes they care about.
We do this to bring more resources to the nonprofits that are changing our world.

