



Transformation in Action



2016 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

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)

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

146 nonprofit members
served in 2016

37 employer clients whose
workplace giving
campaigns we manage
and funds we distribute

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

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

**\$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





Balance Sheet

December 31, 2016

2016

ASSETS

Cash	\$51,833
Promises to give (pledges)	441,498
Member charity fees receivable, net of allowance for doubtful accounts of \$ 0.....	105,499
Other receivables.....	114,002
Total Assets	\$712,832

LIABILITIES AND NET ASSETS

Liabilities

Accounts payable and accrued expenses.....	\$2,670
Campaign funds payable to member/nonmember charities	439,070
Deferred revenue	167,660
Total liabilities	\$609,400

Net Assets - Unrestricted

Undesignated.....	103,432
Total net assets	\$103,432
Total Liabilities and Net Assets.....	\$712,832

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



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.....	\$1,149,961
Campaign management services	85,979
Private sector	175,753
State and local	399,121
Total net amounts raised in campaigns	1,810,814
<i>Less amounts raised on behalf of others.....</i>	<i>1,802,183</i>
Support designated to America's Charities and Affiliates.....	8,631

Member charity fees.....	499,907
Donated services	120,423
Campaign advertising fees	13,500
Total Support and Revenue.....	\$642,461

EXPENSES

Program services

Member campaign services.....	289,538
Campaign management services	243,406
Total program services	\$532,944

Supporting services

Management and general	111,162
Fundraising.....	65,139
Total supporting services	\$176,301
Total expenses.....	\$709,245
Change in net assets	\$(66,784)

Net Assets

Beginning.....	170,216
Ending.....	\$103,432

“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



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](http://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

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 ¥

¥ Private Sector Campaign Participant

2016 Board of Directors

Health First - America's Charities

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

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.

