



MEMBERSHIP ASSEMBLY

WELCOME!



"Level up your employee giving strategy"

Cultivating Your Employee Donors and Maximizing ROI

Emily Bernhards, *Project Manager, America's Charities*

Sarah Ford, *Marketing Director, America's Charities*

Ruth Owens, *Charitable Funds Manager, America's Charities*

Rules of Engagement

Emily Bernhards, *Project Manager, America's Charities*

Rules and Regulations

- **Contacting federal donors:**
 - **DO** acknowledge and communicate with those who provide their personal email address
 - **Do NOT** contact federal donors who provided workplace email ending in .mil or .gov
- **CFC charity fairs:**
 - **DO** educate them about your organization's mission, impact, and goals for the year and encourage them to give through CFC
 - **Do NOT** accept cash or payment directly from federal workers at CFC charity fairs, or ask them to give outside of the CFC

What America's Charities Does for You

- **Applications, Advocacy, & Access:**
 - helping your nonprofit gain access to unrestricted funds through public and private sector workplace giving campaigns, advocating for you when barriers to entry exist
- **C.A.R.E. program one-on-one consultation:**
 - to ensure your “thank you” message to federal donors meets OPM criteria
- **Promotion:**
 - through print, online, and other mediums that enhance your visibility in the workplace giving space

What America's Charities Does for You (continued)

- **Managing and coordinating events outreach:**
 - giving you opportunities to meet face to face with prospective donors nationwide
- **Employee Donor Tax Receipts:**
 - *only for donors who support you through campaigns that America's Charities' team manages*
- **Collecting, organizing, and distributing funds and donor data:**
 - ensuring workplace giving donations come to you in consolidated payments and appear in reports available 24/7/365 so you know who to acknowledge and what was pledged

Cultivating Workplace Giving Donors: Is it Worth it and How Do I Do it?

Sarah Ford, *Marketing Director, America's Charities*

When to Communicate

BEFORE Campaign = August – September: 1st round of reminders

DURING Peak Campaign = October – November: 2nd round of reminders

END Campaign = December – January: thank the masses/final reminder

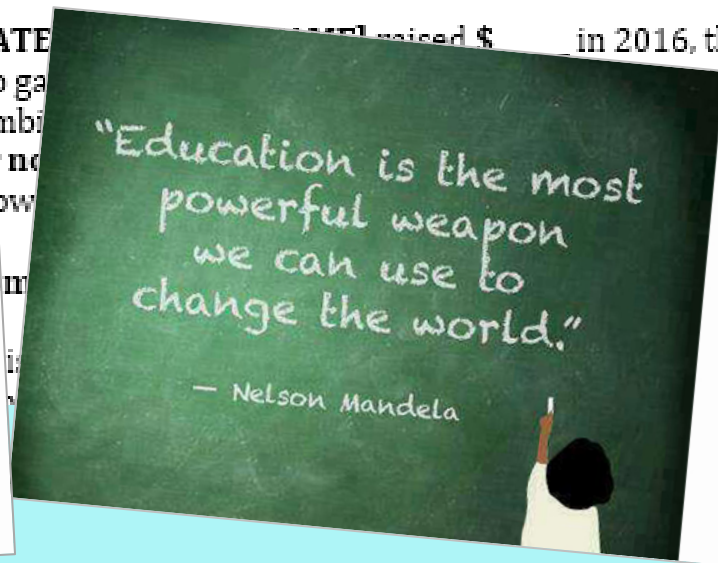
AFTER Campaign = February – June: personal donor acknowledgements

How to Communicate

- Website
- Blog posts
- Press releases
- Social media
- Email/newsletters

[CHARITY NAME] Credits Workplace Giving & CFC Donors for Giving \$_____ in 2016
[CHARITY NAME] Asks Donors to Help Raise \$___ in Effort to [what your charity wants to accomplish this year]

[CITY, STATE, DATE] _____ raised \$_____ in 2016, thanks to the generosity of employees who gave through their employer's workplace giving program and the government's Combined Federal Campaign. [state what your nonprofit's mission is] [CHARITY NAME] to work toward _____



Where's the Data? Putting Your Communication Plan into Action

Ruth Owens, *Charitable Funds Manager, America's Charities*

2015 Campaign

**OCTOBER
2015**

Employee
pledges money
to charity xyz

JANUARY 2016

Initial payroll deduction for
employee's Oct 2015 pledge
takes place

MAY 2016

America's Charities
distributes *first round* of
funds from 2015 campaign

APRIL 2017

America's Charities
distributes *last round*
of funds from 2015
campaign

**Typical Workplace Giving
Pledge Distribution Cycle**



2015 Campaign

2016 Campaign

OCTOBER 2015
Employee pledges money to charity xyz

NOVEMBER 2016
Employee pledges money to charity xyz again through 2016 workplace giving campaign

JANUARY 2016
Initial payroll deduction for employee's Oct 2015 pledge takes place

JANUARY 2017
Initial payroll deduction for employee's Nov 2016 pledge takes place

MAY 2016
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APRIL 2018
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2015 Campaign

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DECEMBER 2017
Employee pledges money to charity xyz again through 2017 workplace giving campaign

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APRIL 2018
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MAY 2018
America's Charities distributes *first round* of funds from 2017 campaign

APRIL 2019
America's Charities distributes *last round* of funds from 2017 campaign

When to Pull Reports

January – March:

- Pledge results from Fall 2016 campaign begin to arrive; start acknowledging donors for their pledge

April – June:

- Peak months for pledge results; send bulk of donor acknowledgements

July – September:

- Pledge results winding down but continue to arrive until final results in September

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	Abby@aol.com	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	oprah@aol.com			
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