



# Membership Overview

Benefits, Pledge Reports & Other Resources  
to Help Your Nonprofit Succeed

July 13, 2016

## Questions After the Webinar?



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

July 13, 2016

# Services Provided to Nonprofits

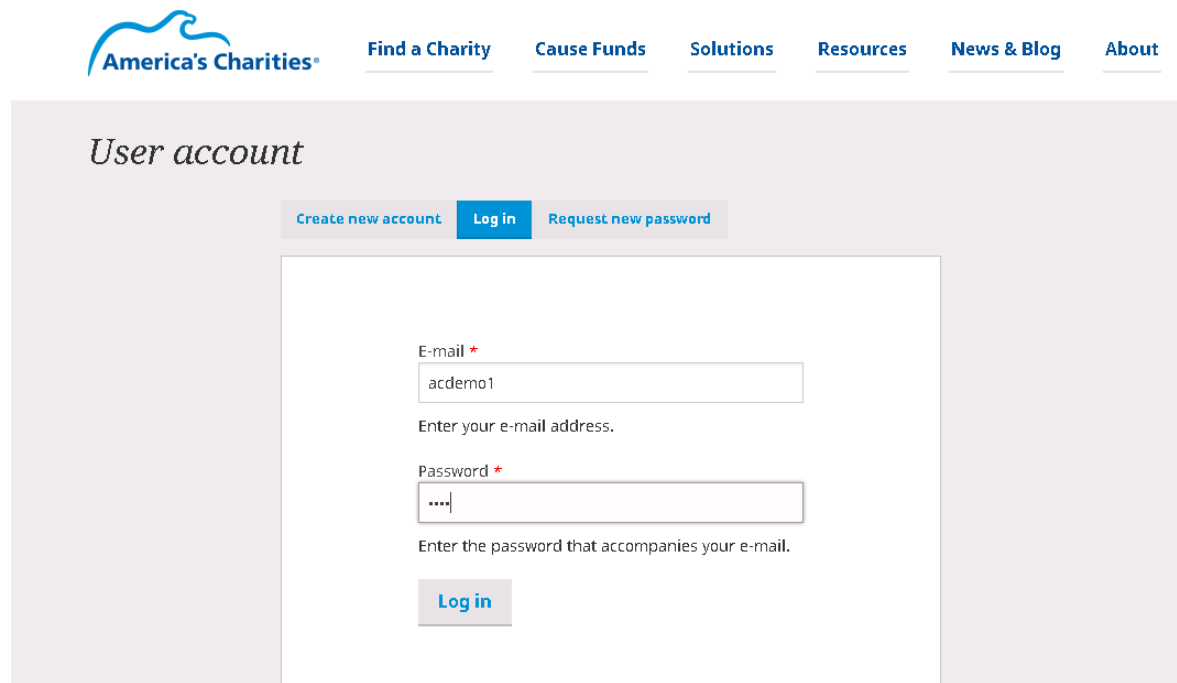
- **Accessing unrestricted funds through workplace giving campaigns** in both the public and private sector
- **Marketing** your nonprofit through various platforms that enhance your visibility in the workplace giving space through print, online, and other mediums
- **Managing** and **coordinating** events outreach, giving you opportunities to meet face to face with prospective donors nationwide
- **Collecting, organizing and distributing** funds received through workplace giving campaigns, ensuring they come to you in consolidated payments and appear in reports available 24/7/365
- **Sharing** best practices, news in the workplace giving space that affect you, to include results of our very own annual Snapshot research
- **Advocating** on your behalf where barriers to entry exist

A large, stylized graphic of a wave in shades of blue, positioned on the left side of the slide. The wave starts from the left edge and curves towards the right, with a smaller crest above it. The background is a solid, medium blue color.

## How to access our Member Portal

# 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 America's Charities website. At the top, there is a navigation menu with the following items: 'Find a Charity', 'Cause Funds', 'Solutions', 'Resources', 'News & Blog', and 'About'. Below the navigation is the 'User account' section, which includes three buttons: 'Create new account', 'Log in' (highlighted in blue), and 'Request new password'. The 'Log in' form contains two input fields: 'E-mail \*' with the text 'acdemo1' and 'Password \*' with masked characters '....'. Below the password field is a 'Log in' button.



# Accessing Pledge and Donor Reports

# 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 federal donor giving through the 2015 CFC pledged through payroll deduction to Charity A:
- Charity A would receive payments from the above mentioned donor beginning in May 2017, thru February 2018.
- **Distribution Schedule:**
  - America's Charities distributes funds on a monthly basis:
    - 2014 campaigns: Paid from May 2015 thru February 2016
    - 2015 campaigns: Paid from May 2016 thru February 2017
    - 2016 campaigns: Paid from May 2017 thru February 2018
    - 2017 campaigns: Paid from May 2018 thru February 2019

# #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



  
2016/17 Member Toolkit

# #5. Donor Acknowledgement Report



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## Donor Acknowledgement Report

Please enter begin and end dates

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

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



  
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## #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



  
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## #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			
		Grand Total	\$69,760.52			

## Reports #2 and #3: Distribution Reports

**These reports require distribution IDs.** 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).

## #3. Member Distribution Report - SAMPLE

Year	Campaign Type	Campaign Name	Amount Pledged	Current Payment	Total Paid to Date	City	State	Zip	Notes
2009	CFC	Cheasapeake 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>				



## #2. Distribution Report - SAMPLE

Campaign Name	Amount Pledged	Current Payment	Total Paid To Date	Thank You	First Name	Last Name	Address	City	St.	Zip	E-Mail
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@yahoo.com">abby@yahoo.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>								

A stylized graphic of a wave, composed of several overlapping, curved bands of varying shades of blue. The wave starts on the left side of the frame and curves towards the right, with the top of the wave reaching towards the top right corner. The background is a solid, medium blue color.

# **Upcoming Communications**

# Member Communications – Summer 2016

## #1. CAMPAIGN EVENTS – HAPPENING RIGHT NOW

- **Have you completed our events survey? We want your feedback. Please complete by Friday, July 15th**
  - <https://www.charities.org/members/survey-which-campaign-event-locations-are-you-interested-attending-fall>
  - **Points of Contact for Event Invites:**
    - Regina Hendrix & Jeff Brown – CFC of the National Capital Area events, some state and local events, and select private sector events
    - Emily Bernhards & Jennifer Watkins – CFC outside of the National Capital Area, state and local campaign events
    - We will be using Eventbrite this fall

## Member Communications – Summer 2016 (Continued)

- **#2. BENEVITY AUTHORIZATION – IN THE NEXT FEW WEEKS**
- **We will be handling updates to Benevity on your behalf this year.**
  - You will receive an email from Robyn Neal, Vice President of Client Engagement Solutions, in the coming weeks with more detail on this.
- **#3. MEMBER SURVEY – IN THE NEXT MONTH**
- **Each year we ask for feedback on how we're doing.**
  - You will receive an email requesting completion of the survey in the coming weeks.
- **#4. MEMBER NEWSLETTER – IN THE NEXT FEW WEEKS**
- **Latest newsletter will arrive in the coming month.**
  - This will be sent out by our Marketing & Communications Department. If you do not currently receive our newsletter, you can sign up for it on your member portal, under the “Resources” tab/ “Member Email Notifications”:  
<https://www.charities.org/members/resources>

## Member Communications – Summer 2016 (Continued)

- **#5: 2017 MEMBER APPLICATION RELEASE – MID AUGUST**
  - You will receive an email with your login information and instructions for completion from either Emily or Jennifer releasing the application by mid-August with a mid-October deadline. Member application trainings will be held on the following dates:
    - **Wednesday, August 17<sup>th</sup> at 2 PM EST**
    - **Wednesday, September 14<sup>th</sup> at 2 PM EST**
- **#5: STATE AND LOCAL ACCESS RESULTS – LATE AUGUST**
  - Current participants in the state and local program will receive their access list for 2016. We will also hold a webinar to talk about the state and local program for those interested for 2017 on:
    - **Wednesday, August 24<sup>th</sup> at 2 PM EST**



## Q&A

**Any Additional Questions, please  
contact us at (703) 674-4953**

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**Thank you!**