

# 2016 Spirit of North Carolina Campaigning for Excellence



United Way  
of North Carolina

Application Form			
Organization Name	Beverly-Hanks & Associates		
Street Address 300 Executive Park	City/State Asheville	Zip 28801	
Name of Person Completing Application	Kevin Montgomery	Phone 828 – 255-0696	E-mail Kevin.montgomery@unitedwayabc.org
Name of Sponsoring United Way	United Way of Asheville and Buncombe County		

## STANDARDS OF EXCELLENCE

**ALL APPLICATIONS MUST BE SUBMITTED USING THIS FORM and COMPLETED "AS IS"!  
Please do not add borders, headings, color, or make any changes to this form.**

Application Standards Checklist		
<input checked="" type="checkbox"/>	1.	Overall Organizational Volunteer Culture
<input checked="" type="checkbox"/>	2.	Raising Community Awareness of Needs and Foster a Spirit of Giving
<input checked="" type="checkbox"/>	3.	CEO, Senior, and General Leadership Involvement and Giving
<input checked="" type="checkbox"/>	4.	Corporate or Foundation Contributions & Other Non-traditional and In-kind Gifts
<input checked="" type="checkbox"/>	5.	Employee Campaign Coordination, Recognition and Incentive
<input checked="" type="checkbox"/>	6.	Overall Per Capita Gift
<input checked="" type="checkbox"/>	7.	Participation Level

**You may submit video links or DVD for viewing by the Selection Committee. Submit DVDs to  
Anita Barker, 875 Walnut Street, Suite 150B, Cary, NC 27511.**

## AWARD CATEGORIES

<b>Organization Employee Size</b>  <i>Check the appropriate box for this application submission.</i>	<b>Type of Organization</b>  <i>Check the appropriate box for this application submission.</i>
<input type="checkbox"/> Up to 25 employees <input type="checkbox"/> 26-50 employees <input type="checkbox"/> 51-100 employees <input type="checkbox"/> 101-200 employees <input checked="" type="checkbox"/> 201-500 employees <input type="checkbox"/> 501-1000 employees <input type="checkbox"/> 1001-1500 employees <input type="checkbox"/> 1501-2500 employees <input type="checkbox"/> 2501-5000 employees <input type="checkbox"/> 5001+ employees	<input type="checkbox"/> Financial/Banking Institutions <input type="checkbox"/> Manufacturing <input type="checkbox"/> Business Campaign <input type="checkbox"/> City/ County Municipality <input type="checkbox"/> Higher Education <input type="checkbox"/> School Campaigns <input type="checkbox"/> Hospital/ Health System <input type="checkbox"/> Retail <input type="checkbox"/> Not-for-Profit Agency - 501(C)3 <input checked="" type="checkbox"/> Professional Services <i>(small business, partnerships, LLC accounting, architect, engineering firm, attorneys, etc.)</i>

**To certify the contents of this application, the signature of the nominating United Way CEO or his/her direct designee must be obtained. An email from the United Way may accompany the application submission stating that it has been reviewed and approved if electronic signature is not available.**

**United Way CEO/Designee Name:**

**Kevin R. Montgomery**

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*Printed Name*

*Kevin R. Montgomery*

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*Signature*

*Kevin.montgomery@unitedwayabc.org*

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*Email*

## **Organizational Overview**

**This information will be used during the Awards Ceremony for winning companies.**

### Describe the philanthropic culture of the organization:

Beverly-Hanks & Associates was founded in 1976 with the merger of Beverly Realty and W. Neal Hanks & Associates, two of the area's most prominent real estate firms. For more than 40 years, their mission to be Western North Carolina's best real estate company has remained unchanged. Their history of success has placed them among the top 7 firms in the state and among the top 200 firms in the nation.

One of the written core values of the company is that they “make a significant difference in the communities in which they live and serve”. Beverly-Hanks & Associates take this responsibility seriously and contributes time, energy and financial resources to dozens of philanthropic causes throughout each year.

### **Core Values**

- Act with integrity in all that we do.
- Foster positive relationships based upon mutual respect, trust and open communication.
- **Make a significant difference in the communities in which we live and serve.**
- Provide expert counsel to our customers through dedicated ongoing training, education and learning.
- Differentiate and distinguish ourselves by a passionate and innovative pursuit of excellence.
- Hold ourselves accountable for our promises and commitments.
- Nurture one another and create a supportive family atmosphere in the workplace.
- Achieve quality and balance in all aspects of our lives.

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### Describe a successful strategy, engagement opportunity, or volunteer activity that ignited campaign success; moving the community to invest, volunteer, or advocate and create lasting impact.

Our annual campaign is fueled by our participation in the annual Days of Impact. Staff looks forward to being a part of this annual event as another way to give back to their communities. We see this as a great way to align why we give with community needs.

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### List 3 bullet-points highlighting numeric campaign success:

- Total campaign contributions increased by 45%
- Employee participation increased by 97%
- # of donors increased by 120%

**Standard 1 – Overall volunteer culture of the organization (this includes work with other community stakeholders, if applicable, as well as United Way).**

- Describe how the organization works in collaboration with the community to solve problems.
- Does the organization have a social responsibility policy or statement?
  - If so, provide some highlights of the mission.
- Is the organization seen as a philanthropic leader and why?
- How does the organization benefit from being involved in serving the community?
- What % of employees are engaged in volunteer work? Does the organization have a volunteer policy?

**Up to 5 points**

Beverly-Hanks have been an active philanthropic participant in our communities for 40 years. Our agents and leadership serve, and have served, on numerous boards of area nonprofits. We volunteer for numerous organizations and contribute financially as well.

Although we do not have a formal social responsibility policy, our employees understand the importance of carrying the torch of our core values each and every day in all aspects of their work. We truly believe that it is our responsibility to make a significant difference in the communities in which we live and serve.

Roughly about 80% (272) employees engage in some form of community volunteer work annually. With the majority volunteering through United Way Days of Impact opportunities.

By being active participants in our communities we benefit from a stronger, healthier community. Truly responsible organization's aid in contributing to make their communities as healthy as possible. I can proudly say that's who we are! As an added bonus, we also benefit from the great relationship building that takes place when community members work together toward common goals.

**Community Support Organizations**

United Way of Asheville and Buncombe County	Western Carolina Rescue Ministry
United Way of Henderson County	Haywood Street Congregation
United Way of Haywood County	Park Ridge Health Foundation
Blue Ridge Literacy Council	Cross Fire Ministries
Lake Lure Classic Academy	MS Society
Mardi Gras in Lake Lure	MANNA Foodbank
The Mountain Community School	TC Roberson High School
Morris Kaplan Kiwanis	Asheville Fire Fighters Association
American Legion	WNC Downs Syndrome Alliance
The Free Clinics	Alzheimer's Association
Salvation Army	Brevard Music Center
Eblen Charities	Carolina Day School
Boy Scouts of America – Daniel Boone Council	The Preservation Society
Open Door Ministry	Mountain Area Pregnancy Services
Mission Health Foundation	Maggie Valley Lions Club
AB Tech Foundation	Reach of Haywood County

**Standard 2 – Organization’s partnership with United Way to raise community awareness of needs and foster a spirit of giving.**

- Document ways in which the organization worked with United Way to generate enthusiasm for community involvement and support.
  - Specific rallies, events or programs
  - Unique awareness activities such as meetings, tours, speakers, and fairs.
- Comment on year-round engagement that exists, if applicable.

**Up to 5 points**

Our annual campaigns always start off with a company wide kickoff announcement by the President and CEO, Neal Hanks. To ensure mass communication, we included this and all other announcements regarding United Way in a weekly video segment titled, *Coffee with Neal*.

Neal also hosted a leadership giving social for staff at him and his wife’s home. He invited David Bailey, President and CEO of United Way of Asheville and Buncombe along with Elizabeth Allen, Leadership Giving Manager to present.

Our focus throughout campaign is to instill a better understanding of the needs in our communities to all staff. We accomplish this by hosting office meetings at all locations. These meetings include presentations from a United Way representative or nonprofit speaker. We want our staff to be able to make informed decisions and adding an educational component to campaign enriches this goal.

In addition, United Way created an e-pledge platform that allowed us to send continuous educational and targeted solicitation messages throughout the campaign period. This real time tool was very helpful in tracking the status of current and new donors; specifically leadership givers and affinity group members. One of the biggest benefits of this platform was the ability to thank employees in a timely manner; which aided in our incentive give away program. All donors who contributed at least \$100 received a custom made Beverly-Hanks & Associates T-shirt.

### Standard 3 - CEO/Senior Leadership and General Leadership Involvement & Giving

- Describe the role that senior leadership plays in “influencing” philanthropy, community support, and campaign activities
- How does the organization’s leadership in general promote a culture of giving?
- List any specific events **that are directed by the leadership team.**

#### Up to 5 points

We believe in leadership by example. Neal Hanks, our CEO, serves on the board of numerous charitable organizations including United Way of Asheville and Buncombe County. He has chaired the annual giving campaign and gives annually at an Alexis de Tocqueville Society level. He has also opened his home up to host leadership giving events.

The majority of our leadership team members give at a leadership level (\$1,000+) to United Way. Our community work and philanthropy is talked about and encouraged in our weekly sales meetings, internal communications sources, and at the annual awards banquet. This culture of caring is passed down to all associates who are encouraged to support their communities where they live and serve. One way Staff can express this act of caring visibly is by wearing their custom made United Way t-shirts during the campaign period.

Todd Kaderabeck, one of our agents, serves on the 2016 campaign cabinet as the Real Estate division chair.

#### Complete the chart below. Up to 5 points

Any positive % change in leadership givers is awarded 2.5 points.

10% or greater increase in % of leadership givers receives an additional 2.5 points

Use local corporate numbers if possible, otherwise indicate as  statewide

Year	Total # of Givers	# of Leadership Givers	% of Leadership Givers	% Change in Leadership Givers	Points Awarded
2016	194	31	16%	+47.6%	
2015	88	21	23%		

UW % of Leadership Givers - 2016 # of leadership givers divided by the 2016 total # of givers

UW Leadership Givers % Change - 2016 # of leadership givers minus the 2015 # of leadership givers divided by 2015 #

#### Outline any factors or information that could affect % of leadership givers.

#### **Standard 4 - Corporate or Foundation Contributions and Non-traditional/In-kind Support**

- State where management places the United Way Campaign within its prioritization of activities.
- List specific sponsorships, resources, materials, loaned executives, advertisements, videos (YouTube as an example).
- List specific “social media” activities/events/activities.

**Up to 5 points. If your organization is Federal or Nonprofit and cannot legally provide a Corporate Gift, please provide information on in-kind gifts and other efforts below.**

Our annual campaign is a very important part of our efforts each year. It is incorporated through all offices and divisions and the results are shared with all. Neal Hanks, President and CEO, produces a weekly video segment known as *Coffee with Neal*. In a very fast paced, spread out organization, effectively communicating with staff is a challenge. In 2016, as an extra added layer of communication around United Way, we built in segments that highlighted upcoming events, competitions, and the status of the campaign through the *Coffee with Neal* segments (Click links below).

- [Announcing 2016 United Way campaign](#)
- [United Way campaign / Day of Impact update](#)

Consistently, Beverly-Hanks & Associates has provided a corporate pledge of \$15,500. We hope to continue this level of support well into the future.

This year when approached for a \$3,000 sponsorship to support the Women’s Leadership Council, it made obvious sense for us to support this worthy cause; especially knowing that a larger majority of our own employees are women and LEADERS.

In the past we have supported the loaned executive program and a few advertising options.

**Local corporate numbers are reported below unless indicated as  statewide**

Year	Corporate Gift	Percent Change
2016	\$15,500	0%
2015	\$15,500	

*Percentage change example: 2016 minus 2015 divided by 2015.*

*Use a plus or minus sign to show a positive or negative % change.*

### **Standard 5 – Employee campaign coordination, recognition and incentive**

- Describe the work of the campaign coordinator and/or committee, listing successful planning tools, specific activities, and events that propelled the campaign to success
- Detail how the employees were recognized within the workforce for their investment of time and resources
- Share any specific incentives used that proved to be effective in building motivation and resolve to give

#### ***Up to 5 points***

Our company culture is based on the more you give, the more you receive and the mindset is not to be individually recognized. However, Julie Smith, our campaign coordinator, is a giant firecracker! She is filled with energy, creativity, and passion. Julie has served as our coordinator for the past 3 years. She made it a point to travel and speak at every office location. She has a leave no stone unturned mentality which made it easy for her to follow up with any lagging donors.

Julie is very active with United Way; serving on the Leadership Giving and Young Professionals (Highlands Circle) committees in the past and she is current on the Women Leadership Council Executive committee.

Our agents are extremely competitive. To add to the fun of campaign and tap into this competition vein, we incorporated an office participation challenge with the winning office receiving lunch from the food truck of their choice (click links below). In the end, our offices became so competitive that two male managers agreed to shave their heads for the cause.

- [Announcing 2016 Food Truck Challenge](#)
- [Winners of the Food Truck Challenge & total numbers for United Way annual campaign](#)

T-Shirt & Jean Fridays for a month were also a big hit and rewarded for donors who gave a \$100 or more. All donors received a personalized thank you from Neal Hanks, President and CEO.

### Standard 6 - Overall Per Capita Gift

- Describe events or strategic action that positively affected per capita employee giving
- Was a specific community issue at the center of employee giving? If so, explain.

#### Up to 5 points

Aside from great incentives, a personal ask from our CEO played a very big role in our ability to move the needle on per capita giving. Neal did a wonderful job of painting a picture of how blessed staff our now in this economic climate compared to 2008. He stated that times are better and we should strive to give back. He asked those that could to consider giving a gift at the leadership giving level (\$1,000). Our staff answered the call with 10 new leadership givers over the previous year and 106 new donors overall. Our per capita giving increased by \$56.

Local corporate numbers are reported below unless indicated as  statewide

Year	Total Employee Giving Amount	% Change	Points Awarded	Total No. of Full-time Employees	Employee Per Capita	% Change	Points Awarded
2016	\$60,133	+64.4%		340	\$176.86	+47%	
2015	\$36,566			304	\$120.28		

Percentage change example: 2016 minus 2015 divided by 2015.

Per Capita Gift: Total Employee giving Amount divided by the Total Number of Employees

Use a plus or minus sign to show a positive or negative % change.

**2.5 Points are awarded for positive percent change in Total Employee Giving Amount**

**2.5 Points are awarded for positive percent change in Employee Per Capita Amount**

**Total possible points for Standard 6 = 10**

## Standard 7 – Participation Level

- How does the organization ensure that all employees have an opportunity to participate in the United Way campaign? List specific steps taken to reach and educate all employees.
- Describe any efforts for outreach with specific groups such as new hires, seasonal employees, retirees.

### Up to 5 points

Our primary way to drive participation up is to communicate and ask. This all starts with a company-wide kickoff layered with messaging through *Coffee with Neal*. Office managers were asked to account for staff not in attendance during United Way employee meetings. Those employees were then followed up with by the campaign coordinator, United Way staff, or their office manager.

Also the use of e-pledge ensured that all staff was given the opportunity to participate in the campaign regardless of where they were located.

### Local corporate numbers are reported below unless indicated as statewide

Year	Total # of Employees	% Change	Total Number of Givers	% Change	Points Awarded	% Participation	Points Awarded
2016	340	+11%	194	+120%		+57%	
2015	304		88			28%	

*Employee % change* – 2016 number of employees minus 2015 number of employees divided by 2015 number

*Givers % Change* – 2016 number of givers minus 2015 number of givers divided by the 2015 number

**2.5 Points are awarded for positive percent change in Number of Givers**

**2.5 Points are awarded for positive percent change in Percent of Participation**

**Total possible points for Standard 7 = 10**