

## 2015 Spirit of North Carolina Campaigning for Excellence

<b>Application Form</b> <i>(www.unitedwaync.org)</i>			
Company/Organization Name	Carolinas Healthcare System		
Address	1000 Blythe Blvd	City/State Charlotte, NC	Zip 28203
Name of Person Completing this Application	Lindsay Finneran	Phone 704-631-0999	E-mail Lindsay.Finneran@carolinashealthcare.org
Name of Sponsoring United Way	United Way of Central Carolinas		Metro Size 1C
United Way Contact for Questions	Corey Bonner	Phone 704-371-7171	E-mail cbonner@uwcentralcarolinas.org
Does the company know a Spirit Application has been submitted on their behalf? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

### STANDARDS OF EXCELLENCE

Below is a checklist of the components of the application. Please complete each standard, in addition to the Organizational Overview, with as much detail as possible. Each Standard is worth up to five (5) points unless designated with an asterisk (\*). Designated Standards are worth up to ten (10) points.

**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.**

<b>Application Standards Checklist</b>	
<input checked="" type="checkbox"/>	1. Volunteer Culture
<input checked="" type="checkbox"/>	2. Partnership with Community
<input checked="" type="checkbox"/>	3. CEO/Senior Leadership and 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, Incentive and Recognition
<input checked="" type="checkbox"/>	6. Overall Per Capita Gift
<input checked="" type="checkbox"/>	7. Participation Level
<p><b>Heads up!</b></p> <p>Please <b>do not</b> add pictures to the Standards Text Box. Instead, attach separate page with pictures labeling the corresponding Standard. (Attachment 1)</p> <p>You may also submit a DVD or attach a Video for viewing by the Selection Committee. The video should not exceed 3 minutes. Please send any DVDs to Anita Barker, 875 Walnut Street, Suite 150B, Cary, NC 27511. DVD's must</p>	

		arrive on or before January 19, 2016.
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**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 50 employees <input type="checkbox"/> 51 – 100 employees <input type="checkbox"/> 101 - 200 employees <input 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 checked="" 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 checked="" type="checkbox"/> Hospital/ Health System <input type="checkbox"/> Retail <input checked="" type="checkbox"/> Not-for-Profit Agency - 501(C)3 <input 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:**

Shannon Young

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**Email:**

syoung@uwcentralcarolinas.org

## Organizational Overview

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

### Describe the mission, vision and philanthropic culture of your organization:

**Carolinas HealthCare System** is one of the nation's leading and most innovative healthcare organizations, providing a full spectrum of healthcare and wellness programs throughout North and South Carolina. The organization offers an abundance of services through multiple locations including academic medical centers, hospitals, healthcare pavilions, physician practices, destination centers, surgical and rehabilitation centers, home health agencies, nursing homes, and hospice and palliative care. The hospital's main objective is to improve and enhance the overall health and wellbeing of its communities through high quality patient care, education and research programs, and a variety of collaborative partnerships and initiatives.

Leading the campaign for the organization is the Corporate Community Benefits division of Carolinas Healthcare System. For the 2015 campaign, a total of \$1,391,992.06 was raised. Although this number is impressive, Carolinas Healthcare System's charitable footprint is not only limited to their generous campaign results. Their Corporate Community Benefit Council coordinates service projects that benefit the community year round. CHS built and repaired houses, donated food, mentored children, donated school supplies, and helped those most in need in our community.

Carolinas HealthCare System supports charitable organizations that provide a wide reach and support multiple communities within their footprint. The Campaign includes United Way, Arts & Culture and Children's Miracle Network. The theme for the 2015 campaign was "Be Part of the Story", which specifically highlighted individual testimonial stories of how people benefitted directly from the partners. Specifically for the United Way of Central Carolinas, the story of Brody was highlighted. Brody was a recipient of benefits of the United Way as well as received care both at CHS & Levine Children's Hospital. He and his family were welcomed to speak at the kick-off event and celebrated with posters all throughout. The hospital is adamant about providing a broad framework of support that enables extraordinary professionals to bring caring commitment, integrity, and teamwork to a vitally important healing mission. The motivating force behind all of Carolina Healthcare System's activity is fulfilling their obligation to meet community needs, which is exemplified in their generous donations of both time and money to United Way and United Way supported agencies.

### Describe ONE unique and meaningful event, activity, or communication that ignited the success of your campaign: (This will be shared at the Awards Banquet if selected as a winner)

Carolinas Healthcare System held pre-campaign events and asked senior leadership and the Community Benefit Council to support the campaign so they could truly have a stake in helping make it a success. Early commitment from this group of about 300 individuals raised more than \$50,000 before the campaign even officially began!!

### List 3 bullet-points highlighting numeric campaign successes: (This will be shared at the Awards Banquet if selected as a winner)

(i.e., dollars raised, % increase over previous year, # of leadership givers, etc.)

- Dollars raised – overall campaign results were \$1,391,992.06 for UWCC & partner agencies
- Over 40,000 hours of community service projects that support UW agencies and priority areas
- 2,509 CHS leadership givers gave nearly 70% of the total contributions

## **Standard 1 - Volunteer Culture**

Describe how volunteerism fits into the organization's philanthropic mission. Include specific volunteer activities (listing recipient organizations) and, if possible, provide number of employees, volunteer hours and dollar value of volunteer participation. (Estimated value of volunteer time for 2013 is \$22.55 per hour) Include organizational incentives for participating in community volunteer activities.

***Up to 5 points***

CHS's Community Benefits Department offers ongoing opportunities for employees and members of their families to volunteer in community programs, projects and activities. Associates are matched with opportunities that align with their schedule and interests. Volunteering at CHS is encouraged year round although there are four signature community benefit programs:

1. Martin Luther King Jr. Month of Service
2. National Volunteer Month
3. Make a Difference Month
4. Holiday Cheer

\*Signature Community Service Projects are highlighted in the attachment section, including examples of events highlighted under each signature community benefit program.

There has been a stronger focus this year on skills based volunteerism, including service on non-profit boards in the community.

**Standard 2 – Partnership with community to raise awareness of needs and foster a spirit of giving**

Describe the organization's philanthropic relationship with the community. Document specific rallies, events, or programs which generate enthusiasm for community involvement and support. Unique partnership and awareness activities should be highlighted such as specialized meetings, tours, speakers and fairs. **Activities which have positive results for year-round engagement should be cited as well.**

**Up to 5 points**

CHS celebrated their 75<sup>th</sup> Anniversary this year and dedicated events to support of the community. Most notably there held a 75<sup>th</sup> Anniversary celebration – all partners, vendors & public welcome – to share in the successes they have made as an organization to the Charlotte and surrounding community.

In addition, the 75<sup>th</sup> Anniversary theme continued to run through the campaign as highlighted by the events below:

- 75,000 Cards for the Troops
- Goal of 75% participation in community giving campaign
- Campaign messaging to steward new and current donors to step up to a gift of \$75
- 75 Community service projects in October

During the course of the campaign, CHS hosted over 100 opportunities for speakers from the United Way, in addition to our partner agencies, to share their campaign mission and testimonials. This provided a great avenue for CHS teammates to better understand the United Way as an organization and further encourage engagement in support of the campaign.

CHS also developed a Community Partner assessment initiative which assesses both non-profit and for profit partners to better understand their strengths and weaknesses. This allowed for a strong and more strategic partnership in CHS being able to connect community partners to help the clients that are served in their healthcare network, allowing for a more positive experience and

In addition to all events, all groups within the organization were encouraged to volunteer and serve with an agency in an effort to get a first-hand look at the community initiatives that we serve. This was well received amongst the CHS teammates as it was an opportunity for education as well as team building.

**Standard 3 - CEO/Senior Leadership and General Leadership Involvement & Giving**  
 Given that Leadership participation is a Best Practice item: Describe how **senior leadership** (CEO/Direct reports) hosts, manages, organizes, participates in, and “influences” philanthropy, community support, and campaign activities. Describe how **company leadership in general** promotes a culture of giving. Specific events that are sponsored (and led) by the leadership team should be noted. Complete the **leadership giving** table below.

**Up to 10 points\***

A gift of \$1,000 or more is considered a leadership gift. However, for Executives, there is a higher tier of gift recognition:

- Silver - \$1,500 for executives
- Gold - \$3,000 for executives

Carolinas Healthcare Systems’ culture is built around support and giving back to the community. This is found in their logo, which is a tree of life, whose canopy represents service that their associates provide to the community and whose root structure represents their entire network of care facilities in their support of the community.

The support of the United Way is a common theme amongst all levels of leadership within the organization. One example of direct support to the United Way of Central Carolinas is Dan Birach, President of HealthWorks Divison, serves on the Board of the UWCC, in addition to the ADT Committee in which he has assisted in solidifying 7 Tocqueville givers in support of the campaign this year.

The CEO also put out a call to action for the entire organization, soliciting their interest in getting involved and supporting campaign efforts. In further support, a ‘Serve with a Leader Program’ was implemented this year in which Executive Leaders were responsible for serving in a community project, recruiting their own volunteers to help with the project and completing the project with their team. This helped to further demonstrate the strong commitment CHS has to the teammates and the community.

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

Year	Total Number of Givers	Number of Leadership Givers	% of Leadership Givers	Percent Change
2015	Results still pending			
2014	5668	298	5%	-1%
2013	5892	337	6%	

UW % of Leadership Givers - 2015 number of leadership givers divided by the 2015 total number of givers

UW Leadership Givers % Change - 2015 number of leadership givers minus the 2014 number of leadership givers divided by 2014 number

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

**Standard 4 - Corporate or Foundation Contributions and Other Non-traditional and In-kind Gifts/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. Please complete the Corporate Gift table below.

**Up to 5 points. If your organization is Federal or Nonprofit and cannot legally provide a Corporate Gift, you will automatically be awarded 5 points.**

Please indicate if you fall into the “N/A Category”

Carolinas HealthCare Systems has the status of being a not-for-profit organization. Because of this status by law they cannot provide a Corporate Gift.

Carolinas HealthCare System produces their own campaign materials including a campaign video and printed pieces. These materials highlight their campaign and stress the importance of every associate doing their part in order to make the community a better place.

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

Year	Corporate Gift	Percent Change
2015	N/A	N/A
2014	N/A	N/A
2013	N/A	N/A

*Percentage change example: 2015 minus 2014 divided by 2014.*

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

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

Describe the work of the campaign coordinator and/or committee and list specific activities, decisions and events. Share specific incentives used in the campaign and how employees were recognized within the workforce for their contributions.

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

Carolinas Healthcare System conducts a highly engaging giving campaign, led by Lois Inglad, AVP of their Community Benefits Division. This team oversees the planning and execution of all the major campaign events by working directly with the United Way of Central Carolinas to help facilitate tours, fairs, speakers, and volunteer projects among many other opportunities.

The Community Benefit Council (CBC) is made up of 165 appointed leaders who meet monthly and represent all departments and divisions across our organization. The CBC is responsible for cascading information and opportunities that support our system community engagement strategies and goals.

Listed below are some of the responsibilities of the Community Benefit Council:

- Monthly meetings
- 175 members
- Campaign symposium- over 300 in attendance
- Incentives for gold and silver giving. CHS Bookmark or CHS Journal- Be Part of the Story
- Month of service that exclusively supports campaign agencies to connect to purpose.
- System wide drawings for early pledging within the first week for prizes like ipads, panthers tickets.
- Victory Celebration- Recognition & celebration
- Alignment with 75<sup>th</sup> Anniversary – tie to campaign goals

**Standard 6 - Overall Per Capita Gift**

Describe what employee, leadership, workplace, or community issues made a difference this year in per capita giving by employees. (Note: If campaign results increased (or decreased) by a measurable amount, it is expected that those changes were driven by some recognizable improvement or change. Example: Instituted specific goals by department for the first time equal to the corporate campaign objective which generated enthusiastic and competitive environment. Complete the employee giving and per capita giving table below.

**Up to 10 points\***

There were several factors which contributed to the education of the importance of giving. Although we don't yet have the results for the Per Capita Gift as the campaign is being processed, it can be observed that the Per Capita Gift will slightly decline effective this campaign season. However, this is seen as a big win due to organizational changes within the network in addition to a recent implementation of a different corporate benefit structure that impacted the entire organizational staff.

However, strong results are posted below as these teams were recognized with an 'Excellence Award' (see attachment for criteria)

HealthWorks (Dan Birach)  
 318% of goal  
 88% participation  
 47% leadership giving

Human Resources (Debra Plousha Moore)  
 176% of goal  
 93% participation  
 38% leadership giving

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

Year	Total Employee Giving Amount	Percent Change	Total No. of Full-time Employees	Employee Per Capita	Percent Change
2015	Results Pending			Pending	
2014	\$1,028,580.95	-5%	13,657	\$75.32	
2013	\$1,083,605.01		13,657	\$79.34	

*Percentage change example: 2015 minus 2014 divided by 2014.  
 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.*

**Standard 7 – Participation Level**

It is important that each employee have an opportunity to support their community through participation in the United Way campaign. How does the company make an effort to ensure all employees have an opportunity to participate? (List specific items) Does the company provide a new hires program to provide employees an immediate opportunity to give? (List specific initiatives) Describe any outreach efforts for retirees to give back to the community through United Way participation. Complete the **employee giving** and participation table below (Donors, not responders). **Up to 10 points\***

Carolinas HealthCare System (CHS) is proud to have enterprise-wide support of our Corporate Community Benefit initiatives through a variety of institutional resources.

The Community Benefit Council (CBC) is made up of 165 appointed leaders who meet monthly and represent all departments and divisions across the organization. The CBC is responsible for cascading information and opportunities that support our system community engagement strategies and goals.

CHS teammates are engaged in Community Benefit (CB) year round through multiple online portals and communication channels. **PeopleConnect**, the internal website, contains information on upcoming community service opportunities, signature initiatives and success stories.

**CHS SERVES** is the employees’ singular portal for searching for approved community service opportunities, signing themselves or their team up to participate, and recording their service hours. Managers can also access reports to track their division’s progress towards our system wide 10% community service participation benchmark.

**CHS GIVES** provides an integrated, secure online platform for teammates to learn about partner agencies and support them financially through our annual Community Giving Campaign.

**One Voice**, an internal electronic and print publication, features monthly articles on Community Benefit signature events, success stories, and community needs.

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

Year	Total Number of Employees	Percent Change	Total Number of Givers	Percent Change	Percent Participation
2015	Results Pending				
2014	13,657		5668	-3.80%	41%
2013	13,657		5892		43%

Employee % change - 2015 number of employees minus 2014 number of employees divided by 2014 number

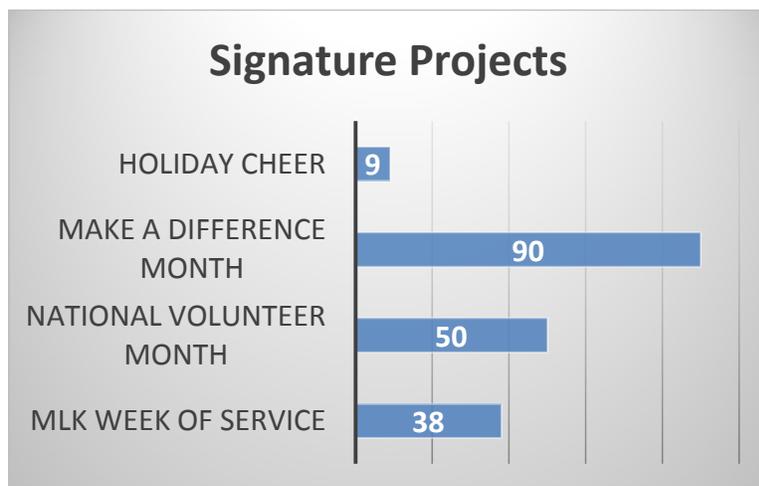
Givers % Change – 2015 number of givers minus 2014 number of givers divided by the 2014 number

## Attachments:

Standard 1:

# Signature Community Service Projects in alignment with POINTS OF LIGHT

January: MLK Week of Service	April: National Volunteer Month & Earth Day	October: Make a Difference Month	December: Holiday Cheer
<ul style="list-style-type: none"> <li>• <b>507</b> Teammates participated; <b>1,230</b> hours of community service</li> <li>• <b>3,672</b> Coats, blankets, gloves, scarves, and hats donated to Share the Warmth drive</li> <li>• <b>38</b> non-profit agencies served across 9 counties</li> </ul>	<ul style="list-style-type: none"> <li>• <b>50</b> community service projects focused on Healthy Environments</li> <li>• <b>373</b> Teammates participated; <b>508</b> community service hours</li> <li>• <b>10,296:</b> total pounds donated to Goodwill and prevented from going in a landfill</li> </ul>	<ul style="list-style-type: none"> <li>• <b>500+</b> teammates participated in <b>90</b> different projects throughout the month</li> <li>• <b>75,000</b> cards for the Troops completed for active and veteran military</li> <li>• <b>1</b> playground built at Title I schools and <b>200</b> trees planted in low income neighborhoods</li> </ul>	<ul style="list-style-type: none"> <li>• <b>1,200</b> Angels (children) &amp; Silver Bells (senior adults) adopted</li> <li>• <b>1,300</b> stockings filled</li> <li>• <b>645</b> Volunteers at local Salvation Army Christmas Center, Goodwill, Boys and Girls Clubs, and more.</li> <li>• Benefited families in <b>9</b> counties</li> </ul>
			
<p>Community Benefit   Carolinas HealthCare System</p>			



Standard 6:



**COMMUNITY GIVING CAMPAIGN  
EXCELLENCE AWARD**

**CRITERIA:**  
100% FINANCIAL GOAL  
75% PARTICIPATION  
10% LEADERSHIP GIVING  
BEST PRACTICES  
YEAR ROUND COMMUNITY BENEFIT SUPPORT

The graphic is a rectangular box with a light blue gradient background. It contains the title 'COMMUNITY GIVING CAMPAIGN EXCELLENCE AWARD' in a bold, teal, sans-serif font. Below the title, the word 'CRITERIA:' is written in a smaller, bold, black font. Underneath, five criteria are listed in a bold, black, sans-serif font, each on a new line: '100% FINANCIAL GOAL', '75% PARTICIPATION', '10% LEADERSHIP GIVING', 'BEST PRACTICES', and 'YEAR ROUND COMMUNITY BENEFIT SUPPORT'.