

## 2015 Spirit of North Carolina Campaigning for Excellence

Application Form <i>(www.unitedwaync.org)</i>			
Company/Organization Name	City of Shelby		
Address	300 S. Washington Street	City/State Shelby NC	Zip 28150
Name of Person Completing this Application	Leslie J. Cobb	Phone 704-482-7344	E-mail leslie.cobb@unitedway.org
Name of Sponsoring United Way	United Way of Cleveland County, Inc.		Metro Size     4
United Way Contact for Questions	Leslie J. Cobb	Phone 704-482-7344	E-mail leslie.cobb@unitedway.org
Does the company know a Spirit Application has been submitted on their behalf?     X 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.**

Application Standards Checklist	
X	1. Volunteer Culture
X	2. Partnership with Community
X	3. CEO/Senior Leadership and Involvement and Giving
X	4. Corporate or Foundation Contributions & Other Non-traditional and In-kind Gifts
X	5. Employee Campaign Coordination, Incentive and Recognition
X	6. Overall Per Capita Gift
X	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 arrive on or before January 19, 2016.</p>	

## 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 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 checked="" 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 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:**

Leslie J. Cobb

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**Email:**

leslie.cobb@unitedway.org

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## **Organizational Overview**

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

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

**Mission Statement:** We will strive for the City of Shelby to be the best governed and most livable city in the state of North Carolina placing value on high quality services, its citizens and its employees.

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**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)**

The City of Shelby began the campaign with the #1 Leaderboard per capita rank in the country. To grow their campaign they identified 2 key departments that make up 45% of their workforce (Police and Fire Departments). To play off their existing competitive nature they created a trophy competition between the two departments which resulted in a \$11,148 increase (45.0% inc.) from these two departments. This combined with the other 12 departments resulted in a \$16,704 increase in giving (28.8%).

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**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.)

- **Increased overall per capita giving from \$199.61 to \$253.62**
- **\$16,704 increase for a total of \$76,593 from 302 employees. (28.8% increase)**
- **73 employees (24.1%) gave 1.8% of gross pay (triple Fair Share) or greater**

## **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**

The City of Shelby has a long history of community involvement. Many countless hours are logged helping citizens in Cleveland County. They encourage their work force to share their volunteer expertise to various agencies and programs throughout the community.

The City of Shelby has always been a leader in the community with their neighbor helping neighbor philosophy and this year's United Way Campaign is a great example of what can be accomplished when you combine strong management support and grass roots involvement. Here are a few examples of their community volunteerism.

#### **Planning and Development Services:**

Sponsors "Keep Shelby Beautiful." This Board recruits other groups and educates them regarding litter sweeps throughout the City of Shelby. Keep Shelby Beautiful materials and equipment is provided for litter sweeps.

Issue "Appearance Awards" for City of Shelby properties

Promotes the Great American Cleanup in March, April and May each year

Volunteers and helps at the Hazardous Waste Collection Days once or twice a year

#### **Utilities:**

Sponsors and works at an 8-1-1 Booth at the Cleveland County Fair, Alive After Five, Hog Happnin' and Livermush Festival each year to educate citizens on calling before digging

Electric Department travels to Elementary Schools to discuss electrical safety with students

Marketing and Gas employees have a booth at the Lowe's Safety Event each year to discuss Gas Safety and Conservation Tips

Marketing travels to Senior Center and Senior Housing to talk with Citizens about Energy Conservation

#### **Housing:**

A Food Commodities Site for the Community every quarter for residents and non-residents.

A summer feeding site for children in the Community

Hosts a budget training program for Cleveland County Community Development Corporation –this is free of charge for the Community to help with budgets and financial planning

Collects and distributes school supplies for children in the community

Hosts a Summer Camp for children in the community, free of charge

#### **Parks and Recreation:**

Host Honors Awards Banquet for Citizens with exemplary service in the Community at the Merry-Go-Round Festival

Holds events and provides food for elementary students at the Park Carrousel

Purchases socks, shoes and sports equipment for children in need

Provides scholarships for children and youth in sports

Works with all the schools, partnering with Civitans and Optimists and Hoppers Chapel to provide events for children throughout the year at the City Park and Holly Oak Park

Helps with "back to school" and "end of school" events-Children come to the City Park and Holly Oak and Churches to do activities, listen to speakers, play games and food is provided

#### **Police:**

Cop Camp – Summer Camp for community children and youth each year

Citizens Police Academy-Educates Community about the different functions of the Police Department

Sponsors an Explorer Post-Part of the Boy Scouts- for children and youth interested in law enforcement careers

Adopt -A –Cop Program-Officers adopt classrooms in the schools and go to spend time with the class and eat lunch with them

Midnight Basketball-A summer basketball program in conjunction with City Parks & Recreation and Cleveland County Education Foundation –basketball program for children and youth in the summer

#### **Fire:**

Install child seats and educate Citizens on proper installation, check approximately 350 seats a year for the general public

Travel to the City and County Schools to teach approximately 6000-7000 children about Fire Safety

Have students tour the Fire Department to learn about fire safety

Project Safe Kids/Safe Community

Assist Citizens with installation of smoke detector

Give out batteries received from vendors to citizens for smoke detectors

Conduct public education at the Park to promote Fire Safety

Members of Cleveland County Safe Kids

Provides fire extinguisher training for businesses

#### **Public Works:**

Haul trash to landfill after Keep Shelby Beautiful completes the litter sweeps

**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***

Education and involvement is one of the keys to the City of Shelby’s success. The City Manager and the Human Resource Director wanted to provide unique leadership and a much stronger informed employee campaign. They wanted to reach out to the community during this economic time and raise as many dollars for those in need. To raise awareness to the need, he hand selected a group of formal and informal leaders to serve as a planning team for the campaign. These leaders have been heavily involved with United Way by providing leadership on our Board, Executive Committee, Fund Distribution Committees, Agency Boards and hands on volunteerism.

The City of Shelby ran a true “grass roots”, highly departmentalized campaign which gathered advice and insight from both the hourly and salaried formal and informal leaders about different incentives and campaign redesign. This gave them an ownership stake in this year’s campaign combined with passion for stepping up and helping their community during a tough economic climate. They identified employees in their own workforce who had benefited from United Way services and those stories were shared throughout the individual department rallies.

The City of Shelby personalized pledge forms for every employee showing how little would come out of their paycheck per pay period to help thousands of people less fortunate. Some of these givers are the ones actually receiving help.

Informal leaders met one on one with every employee to answer questions and give additional information about United Way and its agencies to insure each person received a personal touch and had a voice in this year’s campaign.

**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 1.5% or more is considered a leadership gift.

Even with employment flat, City Manager Rick Howell, made sure that the City of Shelby campaign would be a success. He approved the same great incentives as last year: Days off with pay (4 for Platinum, 3 for Gold, 2 for Fair Share Plus, and 1 for Fair Share) and (11) \$100 gifts cards and a grand prize of a \$600 flat screen TV (to be given away at the United Way Luncheon).

His employees responded to his request of giving at the higher levels. 27.8% of the hourly and salary employees gave 1.5% or more with 87% of those givers giving at least 1.8% (Triple Fair Share) and took advantage of the 4 days off with pay.

To encourage each employee to consider giving at a higher Fair Share level, the pledge forms were personalized for each employee. Not only were their names printed on the forms, each gift level amount per payroll deduction was included as well. Therefore, it was a user friendly pledge form, which the employees appreciated because it showed for a few dollars more they could give at a higher Fair Share level.

Mr. Howell, to encourage higher levels of giving, listed the increased days off with pay incentives on their pledge form showing an increase at each level.

Mr. Howell leads by example. He has served on our United Way’s Board of Directors and Fund Distribution committees. He has also taken a leadership role in shaping the changes in this year’s City of Shelby employee campaign.

Thru the efforts of the employees with Mr. Howell’s leadership we were pleased to grow our leadership givers from 69 to 84 (21.7% increase).

**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	195	84	43.1 %	21.7 %
2014	134	69	51.5 %	-9.2%
2013	137	76	55.5 %	

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”

**N/A**

Even though the City of Shelby can’t do a corporate gift, the one, two, three and four days off with pay shows their dedication to the United Way Campaign and the community. 24% of the employee’s gave at the highest level and got 4 days off with pay. When you include the other levels of giving, the City of Shelby gave a total of 410 days off with pay.

The City provided countless volunteer hours that were made available to a handpicked team which consisted of Police Captain Brad Fraser and the Safety & Risk Manager Lisa Wassen who talked to every employee in every department about the changes in the campaign and the importance of giving more. They bought theater size candy and canned drinks and took them to each of the 12 meetings as a “gift” to employees for listening to their campaign information. They also had a \$25.00 Wal-Mart Gift card drawing at each meeting which created much excitement among employees. If an employee gave at least \$2.00 a pay period and turned their Pledge Form in at the meeting, their name was put into the drawing and at the end of the meeting, an employee name was drawn.

They took the Grand Prize TV box to each meeting with signs on the box, creating excitement and interest in the campaign and also provided sound effects and strobe lights during the presentation.

As part of their thank you presentation, the City paid for a BBQ Luncheon for each employee who gave at least \$2 per pay period.

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

Year	Corporate Gift	Percent Change
2015	\$	%
2014	\$	%
2013	\$	

*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**

The Incentives clearly drove the increase in the City of Shelby campaign.

To encourage giving early, any City of Shelby Employee who turned in their Pledge Form that day and gave at least \$2.00 a pay period would be entered into a drawing for a \$25.00 Wal-Mart Gift card at the end of the meeting which created much excitement among employees.

Platinum	5 chances to win one of (11) \$100 gift cards and the \$600 TV Grand Prize
Gold	4 chances to win one of (11) \$100 gift cards and the \$600 TV Grand Prize
Plus	3 chances to win one of (11) \$100 gift cards and the \$600 TV Grand Prize
Fair Share	2 chances to win one of (11) \$100 gift cards and the \$600 TV Grand Prize

As part of their thank you presentation, the City held a BBQ Luncheon for each employee who gave at least \$2 per pay period.

Prizes were drawn by Co-Chairs Lisa Wassén and Brad Fraser at the United Way BBQ Luncheon.

And best of all, offering up to 4 days off with pay for giving one of the 4 Fair Share levels was a very powerful incentive.



**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\***

In the most recent United Way of America Leaderboard Ranking, the highest community per capita in the nation for local government was \$164.75. The City of Shelby’s per capita giving going into this year’s campaign was \$199.61 (we have 3 local government entities in our community).

Instead of resting on their laurels the City of Shelby designed a “Step-up” campaign and created a 27.1% increase in their per capita giving. This increased their per capita by more than a fourth to a record \$253.62.

This increased their employee gift by \$16,704 taking them from \$59,484 in 2014 to \$76,593 in 2015.

**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	\$76,593	28.8%	302	\$253.62	27.1 %
2014	\$59,484	-2.7%	298	\$199.61	-2.7 %
2013	\$61,154		298	\$205.21	

*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\***

In an effort to offset job losses in our community, our campaign has had to focus on two types of participation, encouraging employees to give and encouraging employees to participate at a generous level. This has helped us create a spirit of giving and while giving, to give generously.

The City of Shelby’s current employee participation is 65% and growing. The amazing part is these givers participate at our higher giving levels. This year we increased our number of givers to 195. 147 of these givers (75.4%) gave between .8% and 1.8% with the majority giving at the 1.8% level.

City of Shelby works hard at encouraging giving and really goes the extra mile in educating its workforce about the agencies and the work they do and asks their employees to consider giving and, if possible, to give generously.

**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	302	1.3%	195	45.5%	64.6%
2014	298	0%	134	-2.2%	45.0%
2013	298		137		46.0%

*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*