

2016 Spirit of North Carolina Campaigning for Excellence



United Way
of North Carolina

| Application Form | | | |
|---------------------------------------|---|---|--|
| Organization Name | Community Link Programs of Traveler Aid Society | | |
| Street Address | City/State | Zip | |
| 601 East 5 th Street | Charlotte/NC | 28202 | |
| Name of Person Completing Application | Phone | E-mail | |
| Brittenay Causieestko | 704-371-6276 | Bcausieestko-Lee@uwcentralcarolinas.org | |
| Name of Sponsoring United Way | United Way of Central Carolinas | | |

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

| Organization Employee Size <i>Check the appropriate box for this application submission.</i> | Type of Organization <i>Check the appropriate box for this application submission.</i> |
|--|---|
| <input type="checkbox"/> Up to 25 employees <input checked="" type="checkbox"/> 26-50 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 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 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

Printed Name

Signature

[**syoung@uwcentralcarolinas.org**](mailto:syoung@uwcentralcarolinas.org)

Email

Organizational Overview

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

Describe the philanthropic culture of the organization:

Astonishingly, forty percent of our local workforce cannot afford safe and decent housing, defined as being forced to spend more than a third of their income on housing. Annually, rental rates are increasing at a much higher percentage than wages. Additionally, individuals earning “moderate incomes” who are successful renters find themselves challenged to buy a home given barriers to saving appropriately for a down payment.

Helping to solve these problems is the driving force behind our Homeless to Housing, Homeownership, and Financial Literacy programs.

There is no better benefit than ensuring that every mom, dad, child, and individual in our community has a safe, decent, and affordable place to call home. Our programs are aimed at reaching this goal through services that:

- Assist our workforce who are experiencing an economic hardship
- Educate to ensure individuals can sustain their own housing
- Connect individuals to a variety of resources to help them achieve stable housing
- Help those who want to help themselves

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.

Even though Community Link only operated a week long campaign, they were able to pack in a lot of engagement strategies for their employees. The events and activities of their “Spirit Week” campaign theme incorporated a variety of interests. For example, the activities and events involved everything from movies and sports, to food/cooking and treasure hunts, which engaged different employee interests across the board.

List 3 bullet-points highlighting numeric campaign success:

- Leadership Giving Increased by 4.55%
- Employee Giving Increased by 11.68%
- Campaign Total Increased by 7.23%

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

- Describe how the organization works in collaboration with the community to solve problems.

As a nonprofit UWCC partner agency, working in collaboration with the community to solve problems is Community Link's core business, so answering this question is a little different than it would be in the case of a typical for-profit. Community Link works collaboratively with many community partners in order to achieve its mission, but it's not necessarily evidence of a volunteer culture, just a business best practice. Community Link does go the extra mile in this regard, however. Many staff members spend significant time collaborating with other nonprofit or governmental organizations to solve community problems. For example, staff members co-chair the CharMeck Housing Our Heroes committee tasked with ending Veteran homelessness. Staff lead committees in more rural communities of the Piedmont region of NC to bring different homeless service providers together to create one efficient seamless system to serve people experiencing homelessness. The agency as a whole works collaboratively with other partner agencies, in particular those who are also part of the Children and Family Services Center, to offer stronger, more holistic support to the people being served.

- Does the organization have a social responsibility policy or statement? **No**
 - If so, provide some highlights of the mission.
- Is the organization seen as a philanthropic leader and why?

Community Link employees have an emerging culture of philanthropy, and our most recent UWCC employee giving campaign was evidence of this. Too often nonprofit employees believe they literally "gave at the office" through their jobs, and therefore don't have a responsibility to volunteer or financially support important community work. Community Link is working to change this, and the excitement around our United Way campaign, not to mention its significantly increased success this year, demonstrates this growing culture of philanthropy.

- What % of employees are engaged in volunteer work? Does the organization have a volunteer policy?

Community Link does not have a volunteer policy. They do however, have a generous PTO policy and employees are encouraged to use time to volunteer. Many of the staff members volunteer in ways related to our mission. For instance, many will volunteer in the upcoming Point In Time County to count the number of people experiencing homelessness on a given night. One staff person has begun her own non-profit to connect low-income and formerly homeless people to high quality, nutritious food, and has been able to use this work with Community Link clients.

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

Community Link kicked off at their all staff meeting with the ECC presenting the schedule of events for that week and United Way representatives conducting an engagement activity. The events of the week are listed below:

- MONDAY- Movie Star Monday-dress up as your favorite movie star.
- TUESDAY-Rep your “TEAM” Tuesday-please represent any “team” you want my wearing their logos or even their colors or even decorating your cubicle.
- WEDNESDAY- Wacky Wednesday-dress as wacky as you want and remember to be creative.
- THURSDAY- Treasure Hunt Thursday- there will be an email with hints to “treasure” in the office so please pay attention.
- FRIDAY-Office Olympics and “Dip-Off”-there will be some contests throughout the day that will test certain skills
- THE DIP OFF, “I Dip, You Dip, We Dip,” WILL BE A FOOD DIP COMPETITION AND WE WILL ALL VOTE FOR OUR FAVORITE

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

- Describe the role that senior leadership plays in “influencing” philanthropy, community support, and campaign activities

Senior leadership encourages philanthropy and support of the campaign by offering incentives, such as additional days off, and leading by example with individual giving in the community. Leadership appoints campaign committee chairpersons and allots a budget for campaign activities. To be selected to lead the campaign committee or serve on it is seen as a high compliment.

- How does the organization’s leadership in general promote a culture of giving?

Staff meetings always include a “mission moment” to help everyone on staff understand that, no matter their role, they are part of changing lives for the better. Meetings also always include an update on fundraising to highlight the importance of philanthropy to our mission. Staff are recognized publically for volunteer activities and supporting philanthropy in our organization.

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 | 34 | 1 | 2.9% | 0.0% | |
| 2015 | 36 | 1 | 2.8% | | |

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.

Being a smaller nonprofit, the level of pay for most employees might be a factor to the number of donors who gave at a leadership level. A smaller staff overall translates to a lower number of leadership positions and therefore compensation is generally lower among the remaining positions.

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.

Community Link holds United Way in high regard and as evidenced in the leadership giver record, the Executive Director supports United Way at leadership level. Support and information about United Way is communicated from the top down and is proven to be a great factor for campaign success.

The internal campaign team put forth great effort and thought increasing giving levels and associated incentives. This year an amount between \$75 and \$101 was the threshold for 1 day off. A donation between \$102 and \$207 could receive 2 days off and over \$208 receives 3 days off. This generosity from the senior leadership in granting time off shows support and the priority of United Way campaign.

Campaign activities were posted on Facebook.

Local corporate numbers are reported below unless indicated as statewide

| Year | Corporate Gift | Percent Change |
|------|----------------|----------------|
| 2016 | \$0.0 | 0.0% |
| 2015 | \$0.0 | |

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

Rocco Baceilli and Anisse Avery put together a campaign team who would meet regularly to discuss and brainstorm campaign objectives and events. Their successful schedule of events is shown below.

- MONDAY- Movie Star Monday-dress up as your favorite movie star.
- TUESDAY-Rep your “TEAM” Tuesday-please represent any “team” you want my wearing their logos or even their colors or even decorating your cubicle.
- WEDNESDAY- Wacky Wednesday-dress as wacky as you want and remember to be creative.
- THURSDAY- Treasure Hunt Thursday- there will be an email with hints to “treasure” in the office so please pay attention.
- FRIDAY-Office Olympics and “Dip-Off”-there will be some contests throughout the day that will test certain skills
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With the planning and implementation of these events, Community Link was able to engage their employees and increase their donations by 7.23%.

Rocco and Anisee utilized their United Way resources to involve their Campaign Associates and Relationship Manager to enhance their campaign. We were included in meetings and presented at their all staff meeting to kick off the campaign.

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

The campaign events were designed to be both inclusive and fun, while still being United Way driven. Because of Community Link's position in the community as a nonprofit, the events were centered on engagement and fun, because the purpose behind the campaign was already understood. Thus, increasing the employee per capita.

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 | \$ 8,756.08 | 7.23% | | 36 | \$243.22 | + % | 2.5 |
| 2015 | \$ 8,165.64 | | | 36 | \$226.82 | | |

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

Community Link ensured that all employees had an opportunity to participate by showing the importance of the United Way and Community Link partnership. This was done through daily emails and through numerous all staff meetings throughout the campaign planning process.

All new hires had the same opportunity to participate in the United Way Campaign. They were provided a pledge form and the organization made sure that they received all emails regarding the campaign.

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 | 36 | 0% | 34 | -5.56% | | 94.44% | |
| 2015 | 36 | | 36 | | | 100% | |

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