

2015 Spirit of North Carolina Campaigning for Excellence

Application Form <i>(www.unitedwaync.org)</i>			
Company/Organization Name	Dixon Hughes Goodman		
Address	500 Ridgefield Ct	Asheville, NC	28806
Name of Person Completing this Application	Richard Caro	828-239-1046	rcaro@unitedwayabc.org
Name of Sponsoring United Way	UW or Asheville and Buncombe County		1C
United Way Contact for Questions	Same	Same	same
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.**

Application Standards Checklist	
<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>Heads up! Please do not 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

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 50 employees <input type="checkbox"/> 51 – 100 employees <input checked="" 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 type="checkbox"/> Not-for-Profit Agency - 501(C)3 <input checked="" type="checkbox"/> Professional Services <small>(small business, partnerships, LLC <u>accounting, architect, engineering firm, attorneys, etc.)</u></small>

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:

_____ *Davin D. Bailey*

Email:

_____ *Dbailey@unitedwayabc.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:

Our passion to serve goes beyond the work we do for our clients. The Dixon Hughes Goodman Foundation demonstrates a culture that seeks to put people first. Our team is united in working to inspire change and enrich the lives of the people who make up the communities in which we live and work. More than a corporate social obligation, philanthropy is our whole-hearted commitment.

Together, we have brought real change to our local communities. Every year, we collaborate to raise funds benefiting colleges and universities and donate millions of pounds of food to local food banks. From building houses to participating in charity runs to mentoring school children, our individual offices work to make a difference in their local communities.

It's all part of our people-centered philosophy. Whether we're giving our time or providing financial support, DHG is committed to building better communities for the people we serve.

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)

Middle School Mentors

We know that Middle School mentors can play an important role in the lives of our local students and DHG know that too! That is why 4 DHG Volunteers have stepped up to support Middle Schools students at Buncombe County's Enka Middle School- the school is located near their offices. UWABC has worked with Enka Middle School as part of our Middle School Success Initiative and the UWABC Resource Coordinator at Enka, Kyle Garrett, recruited and trained these 4 volunteers to become before-school, morning mentors to help students complete homework and to participate in school clubs—before the school day has even started.

With DHG employees as our trailblazers we hope to have many more volunteer mentors at our partner Middle Schools in Asheville and Buncombe County!

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.)

- Raised a total of \$121,887
- 27 Leadership Donors gave over \$100k
- In 2015 DHG ran their first E-pledge campaign!

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

DHG gives back to the community through volunteerism in many ways:

Middle School Morning Mentors: As mentioned above, 4 pioneering young volunteers have stepped up to be the first early morning mentors at Enka Middle School.

Girls in Charge: In addition, one DHG employee, Malorie Irwin, has been a volunteer with Enka Middle School, Girls in Charge club for the past two years. Girls in Charge has partnered with our Women's Leadership Council to provide mentors to Middle School girls to build confidence and to empower girls to succeed in Middle School and to graduate High School.

Highlands Circle: DHG's young leaders have been integral to our Highlands Circle, young leaders affinity group, serving on the steering committee for the group. Elizabeth Britton is the latest DHG employee to serve in that capacity.

Board Membership: David Wiggins, (who chaired our UWABC campaign cabinet in 2014) serves as a board member.

Audit Review Team: Brian Broom serves.

Peaks Development Team: This team is responsible for Leadership Giving at UWABC. Michael Rauchwarg has served for multiple years on the team.

Financial Services CEO Call Team: more than a few DHG employees have volunteered to service in this role helping us to maintain and build strong relationships with the community leaders in our local financial services. This past year Adrian Vassallo provided excellent support.

Day of Caring: DHG has always participated in our annual Day of Caring Volunteer effort in September. This year twelve volunteers performed deep-cleaning at the Smith McDowell historic home on the campus of AB-Tech community college

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

DHG provides strong community support through their campaign pledges, voluntarism, and leadership in community initiatives.

In 2014, as part of the DHG campaign rally, DHG hosted a performance by a young author from Enka Middle School. The teacher/advisor for Enka’s creative writing club accompanied the student and provided context for the reading. The student chose to read from her Percy Jackson inspired fan fiction short story and those in attendance were captivated by both the writing and the student’s performance of her work.

Building on this experience, this year DHG invited members of UWABC’s Women’s Leadership Council and Peaks Development Committee to attend their campaign event and to share the importance of UWABC’s work in Middle Schools and the impact that Leadership Giving, and mentoring, can have on a student’s life.

The resulting campaign and the creation of a team of inspired mentors is positive proof that DHG walks the talk when it comes to Community Partnerships!

See attached for other community partnerships

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 to UWABC’s community investment fund _____ is considered a leadership gift.

Increases in Giving: This year 30 of the 81 DHG donors increased their gifts by 5% or more!

ADT: 6 DHG employees give at the ADT level and provide \$78k of the campaign at DHG. These 6 leaders are the backbone of the giving culture at DHG and they also set the tone for voluntarism through their own participation in United Way.

Event Attendance: DHG’s 27 leadership donors are active donors and attend events, both internal to DHG’s campaign and at local United Way events throughout the year.

Underwriting: DHG has been an underwriter, at the Gold level, for our Leadership Giving efforts for many years. This underwriting support provides advocacy for leadership giving both internally and across our community.

CEO Call Teams: Every year DHG enthusiastically supports our CEO Call efforts by having an employee serve on the call team. These team members are always excellent *peer-spokespeople* for why it is important to give back to our community and why it is important to give to our community investment fund.

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	81	27	33%	+3%
2014	71	26	36%	+4%
2013	68	25	36%	

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”

Underwriting:

DHG’s underwriting support of \$5,000 allows us to hold Leadership Giving events and to reach many more potential leadership donors.

Although the organization does not provide a corporate gift, they have provided matching dollars that assists young leaders with access to our Highlands Circle young leaders affinity group.

In 2014, DHG provided UWABC with a Loaned Executive! We were excited to have a “true” LE support our campaign at DHG and across the community. We hope to get another in the future!

Advertisement:

DHG is always advocating and sharing across social media platforms! This network of support helps to align and remind others in their business-peer group of our work with DHG and our funded partners.

Resources:

Being an accounting firm, it was easy for DHG to see the instant productivity gain for them as well as us. By using E-pledge, DHG allowed us to cut down on paper processing which requires staff manually inputting the data (e-pledge activity is automatically entered into our database at the time of gift), and helped expedite campaign reports for easy follow-up with donors to thank and confirm giving.

The transition process went smoothly and the thermometer on their e-pledge site kept track of their campaign returns and in the end showed their campaign as over-goal by 107%.

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

Rallies and Events: Anna Buys was our amazing campaign coordinator this year! She coordinated the new E-Pledge system, campaign kick-off events, leadership giving and affinity group events, agency speaker, and a finale, at a local brewery, Catawba Brewing, for DHG to celebrate their generous success!

Food: All campaign events have great food, whether it's breakfast or lunch or and ice cream social.

Recognition and Communications: Anna created a Thank You power-point that was looped at the finale event and listed stats and names for donors highlighting their individual and organizations wide generosity.

Incentives: The most popular incentive at DHG has been their PTO bonus. Each employee giving at the Leadership Giving level, or the Highlands Circle Young Leaders level or if donors give 5% or more they receive 4 hours of PTO.

See attached photos of campaign events

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*

Recognizing internal factors: Internal and external factors are always a concern for fundraising professionals. So imagine the concern when DHG announced an expansion that would involve uprooting their staff in order to renovate their offices in the middle of campaign. Staff often did not know which floor they were to report to until they arrived at work.

Very frustrating and chaotic, as they rolled into campaign they quickly realized that standard campaign pledge forms and the possibility for follow-up would have been difficult if not impossible. And their campaign numbers possibly would have been at risk for going south.

The implementation of E-Pledge allowed them to connect with more employees in a short period of time and without adding to the obvious disruption. Overall giving and Leadership Giving was impacted positively by the use of this tool.

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	\$121,887	+7%	121	\$1,007	+7%
2014	\$113,510	+8%	121	\$938	+8%
2013	\$104,816		121	\$866	

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**

DHG recognized their challenges associated with ensuring that all staff receives the appropriate information in order to make an informed decision around supporting United Way. With varying work schedules and positions, it was hard to host an all employee meeting that would yield a high level of participation without lots of follow up afterward. This year in an effort to combat this challenge and improve staffs knowledge and access to giving to United Way, DHG implemented an E-Pledge campaign. This strategy aligns much better with the culture of their organization; being a paperless workplace. However, they did not abandon the traditional workplace meeting format. Instead they married the high tech with the high touch to help maximize their expectations.

In addition, they host a series of year round employee meetings connected to United Way’s Highland Circle program to engage staff regularly regarding community issues. They also encourage all of their staff to participate in the annual School Supply drive by placing collection bins in their lobby. They use a similar method to support a UW Funded local food pantry.

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	121	0%	81	+4%	67%
2014	121	0%	71	+14%	59%
2013	121		68		56%

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