

2016 Spirit of North Carolina Campaigning for Excellence



United Way
of North Carolina

Application Form			
Organization Name	EY		
Street Address	City/State	Zip	
100 North Tryon Street, Suite 3800	Charlotte, NC	28202	
Name of Person Completing Application	Phone	E-mail	
Jonathan Russell	704-371-6256	jrussell@uwcentralcarolinas.org	
Name of Sponsoring United Way	United Way of the 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 type="checkbox"/> 26-50 employees <input type="checkbox"/> 51-100 employees <input type="checkbox"/> 101-200 employees <input type="checkbox"/> 201-500 employees <input checked="" 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:

Shannon Young

Printed Name

Signature

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:

EY Charlotte has always believed that the business community holds a critical role in supporting our community. As one of Charlotte's largest professional services firms, EY takes its role in the community very seriously. Through the example set by firm leadership, EY empowers its partners, directors, and associates to become involved and find their passion. In partnering with the United Way of the Central Carolinas, EY believes that it is part of the greatest change that can take place in our community.

EY's vision is for their leadership to set the tone for the community in effort to meet the most pressing need of our community. Through investment in education, sustainability, and entrepreneurship, EY seeks to foster community growth that creates the social change our city needs. With a belief that a community works together to lift those in need up, our environment and home becomes a better place for everyone to live.

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.

After listening to the feedback provided from the campaign the year before, EY placed a strong emphasis on two points of growth for the campaign:

- Reviewing leadership pledges from the past campaigns, EY felt that the firm could do more to grow its leadership campaign and do more to lead by example for all associates in the firm. At the beginning and end of the campaign, select partners, including Managing Partner Malcomb Coley and Mike Simon (an ADT Cabinet Representative) put together a leadership drive that relied on personal calls to company leaders. This brought new leadership donors in, but also challenged current leadership donors to increase their gift in a significant way.
- After the campaign last year, employees asked for more communication. Part of the strategy was more frequent communication, and publicizing the goals and aspirations of EY for the campaign. This helped to create a better team spirit and more commitment to meeting the company goal.

List 3 bullet-points highlighting numeric campaign success:

- The 2016 EY Charlotte United Way Campaign grew by \$34,220, totaling \$472,230. This is a 7.8% increase.
- Leadership giving (\$1,000 +), grew by \$49,104. This is a 12.7% increase. Of the 349 givers in 2016, 104 were at leadership level (30%) and 22 was at the ADT level (6%)
- The average gift in 2015 was \$1,255. The average gift in 2016 was \$1,353.

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

EY Charlotte has continuously supported involvement in the community by its employees through a number of different ways.

1. EY and its employees are involved in all engagement groups and committees offered by the United Way of the Central Carolinas. This includes LINC and Young Leaders, Women United, A-LIST (African-American engagement group), and the ADT Cabinet. They also have had a number of partners serve on the UWCC board and other committees. The current Office Managing Partner, Malcomb Coley, served as the Campaign Vice Chair, and will be the overall Campaign Chair in 2017, as well as serving on the governing board.
2. As part of each employee's professional goal setting, staff are required to set one goal that relates to quality people. Part of this is how the employee interacts with the community and promotes a spirit of volunteerism and passion for the community.
3. EY promotes a number of affinity groups within the firm that make up a variety of demographics. These groups meet to discuss professional development and growth, as well as avenues for community involvement and promotion of the firm's social responsibility in the areas of education, entrepreneurship, and environmental impact.
4. During the spring, EY participates in a local Arts and Science Council campaign to invest and promote the growth of arts and culture in our community.
5. As the kickoff to the campaign, EY hosts a "Connect Day." This annual event brings together hundreds of employees across the Charlotte community for a day of service. It has significantly grown since its beginning, and this year surpassed 500 volunteers serving 25 different locations, more than half of the local office. The agencies supported include UWCC partner agencies, as well as other organizations supporting areas such as animal welfare, the arts, and the environment.

EY believes that the company benefits as the community grows and thrives. Relying on a well-educated workforce, investments in education will help create the next generation of professional service employees the firm will need to thrive. In addition to the future employees of EY, a community in which economic opportunity is available to all will create more growth and more opportunity for EY to grow as a firm.

In addition, the accounting and consulting industry consists of a dynamic and young workforce. It is in the best interest of our firm to create an environment that encourages employee retention and professional growth. Through the engagement with the United Way and other volunteer activities, EY's employees are more likely to pursue its future within a firm that promotes leadership, camaraderie, and an opportunity to pursue their passions.

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

In 2016, EY and its partners piloted a new program to create the next generation of leaders both within the firm and in the community. The EY Charlotte Growth Council was a selection of 18 emerging leaders within the firm. Through a series of 5 sessions, these professionals met once a month to chart their future in the firm, and discover their passion for service in the community.

During the first half of each development, EY focused on how each professional could enhance his or her brand within the firm. During the second half, the United Way of the Central Carolinas conducted non-profit board training to prepare each professional to serve on a local non-profit board. The five areas of training included:

- **Introduction to Non-Profits**
- **Board basics**
- **Financial Management and Governance**
- **Mission Connection and Fundraising**
- **United Way Agency Funding Simulation**

At the conclusion of this event, each of the 18 employees were invited to a “Speed Networking” Event. During this event, 18 agencies (United Way partner agencies and non-partner agencies), were also brought to meet and greet each professional. Moving across the room, each agency and EY employee dialogued for five minutes to determine if there was a potential for further engagement, including potentially sitting on their board and or committees. The United Way of the Central Carolinas hopes to promote this program to other organizations in the greater Charlotte community.

In addition to the Growth Council, EY promoted United Way engagement and education by:

- Discussing the importance of the campaign and United Way impact at service line events.
- Hosting a “Donations for Donuts” event in which employees were invited to the company breakroom on a Friday to have donuts and coffee and make their pledge at designated stations.
- Inviting a speaker from a partner agency at the capstone of Connect Day at the Olde Mecklenburg Brewery.
- Promotion of volunteer events within service lines throughout the year.

Given the success of this pilot program, it is being rolled out as a model in the firm’s Southeast region – which includes locations in six states.

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

EY believes that Senior Leadership can influence philanthropy by leading by example. Without the dedicated commitment of senior leaders, EY would not have been able to consistently grow its campaign over the last 10 years by \$300,000. This includes serving on local boards, donating items and tickets for participation incentives, interacting with young professionals and promoting companywide events, and working hard to recruit new donors. Challenging senior leaders to meet the expectations of the community and company is part of the giving culture.

By promoting a top-down strategy, EY has consistently been able to grow its overall campaign and leadership giving 310% over the last 9 years. Specific examples include:

1. Malcomb Coley sits on the United Way Governing Board and served as the Vice Chairman of the 2016 Regional Campaign Cabinet. Malcomb will also be serving as the Chairman of the 2017 Campaign Cabinet and is a dedicated Alexis De Tocqueville donor. Malcomb also sends out an opening email to all employees about the importance of the campaign.
2. Advisory partner Mike Simon serves on the ADT Cabinet, working to grow the ADT giving in EY and the overall campaign for the United Way.
3. Assurance partner Jeff Ledford sits on the United Way Governing Board and also chairs the finance committee.
4. ECC Brandon Powell serves on the Volunteer Community Investment Council, a two-year commitment making tough decisions in our allocation process.

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	349	104	29.7%	6%	
2015	340	98	28.8%		

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.

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.

Management places the United Way Campaign and its overall relationship with UWCC as a top priority of its employee’s engagement with the community.

Every year, EY sponsors a team at the annual Hi-Tech Shootout hosted by UWCC. This is golf tournament is the single largest day of giving for UWCC.

In addition, EY has also played as significant role in the promotion and sponsor ship of our A-LIST Engagement Group. African-Americans Lead Influence Support Teach, is an engagement group of the United Way of the Central Carolinas. Members of this society work with community and corporate partners to help build, strengthen and support communities in the areas of reducing poverty, improving literacy and economic mobility. Their goal for our communities is to create a culture of diversity, inclusion and equality.

Office Managing Partner Malcomb Coley has personally hosted a membership event at his home, and EY has sponsored a kickoff event at the Levine Museum of the New South.

EY also has a Charitable Committee that meets regularly through the year to determine where local corporate dollars can be invested in the community.

Local corporate numbers are reported below unless indicated as statewide

Year	Corporate Gift	Percent Change
2016	\$15,000	0%
2015	\$15,000	

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

The preparation of the Campaign Coordinator and his/her team begins at the conclusion of every campaign with a feedback session from employees. Upon hearing the results, the team works to implement the changes in the next campaign.

In the lead up the campaign kickoff, the ECC and team meeting monthly (more frequently in preparation for Connect Day) to determine new communication strategies and request incentives for participation from senior leaders.

To motivate employees, EY provides a number of incentives to its employees, including game tickets to local sports teams, gift cards, and other fun incentives.

Throughout the campaign and during numerous executive meetings and other office meetings, the ECC and other team members are recognized for their leadership and unwavering commitment to the EY Charlotte office United Way 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

EY has been growing rapidly over the last 10 years, increasing by 670 employees. With such significant growth, EY recognizes the challenge in positively affecting per capita employee giving. In order to increase pledges, EY has placed a strong focus on increasing leadership giving pledges and the overall average gift.

Between 2015 and 2016, Leadership giving increased by almost \$50,000 and the average gift size has increased by 25%.

Recognizing the need to increase per capita giving, EY plans to aggressively engage employees through year-round engagement strategies focused on increased volunteering and engagement group participation, education on United Way impact, and stronger campaign events and engagement.

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	\$472,230	7.8%	2.5	909	\$519.50	-4.5%	0
2015	\$438,010			805	\$544.11		

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

EY makes every effort to allow all employees to participate in its annual United Way Campaign. In addition to multiple E-pledge reminder emails:

1. EY Connect Day hosts station kiosks for employees to give immediately to the campaign at the event.
2. A “Donuts for Dollars” giving system was set up to encourage employees to give at the office.
3. As new employees are added to EY Staff, discussion of the United Way Campaign and Community Engagement are part of new hire orientation.
4. EY leaders speak at Service Line events to encourage participation in the campaign and show Senior Leadership involvement.
5. Posters and thermometers are displayed throughout the office to educate employees on company goals and the purpose of the United Way in the community.
6. A United Way “FAQ” was distributed via email to educate employees on the basics of the United Way and how they can get involved.
7. Quarterly lunch and learn sessions are offered to the entire office to increase awareness regarding the work of the United Way. During each quarterly session, a partner agency attends and talk about its efforts and mission.

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	909	13%	349	+2.6%		38%	
2015	805		340			42%	

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