

2015 Spirit of North Carolina Campaigning for Excellence

Application Form <i>(www.unitedwaync.org)</i>			
Company/Organization Name	Eaton Corporation		
Address	8171 Planer Mill Road	City/State Middlesex	Zip 27557
Name of Person Completing this Application	Tamika Joyner	Phone 252-937-2213 ext 205	E-mail tamikajoyner@unitedwaytr.org
Name of Sponsoring United Way	United Way Tar River Region		Metro Size 4
United Way Contact for Questions	Ginny Mohrbutter	Phone 252-937-2213 ext 203	E-mail ginnymohrbutter@unitedwaytr.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.**

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!</p> <p>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</p>	

Anita Barker, 875 Walnut Street, Suite 150B, Cary, NC 27511. DVD's must arrive on or before January 19, 2016.

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 checked="" 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 checked="" 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 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:

Ginny Mohrbutter

Email:

ginnymohrbutter@unitedwaytr.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:

The Middlesex plant is strongly committed to supporting Eaton's and Hydraulic Operation's vision and values.

Mission:

To be our customers' best supplier, providing distinctive and highly valued products, services and solutions

Vision:

To be the most admired company in our markets

Vision is measured by:

Customers say: "We want to do more business with Eaton."

Shareholders say: "Eaton is one of my best investments."

Employees say: "I am proud to be part of the Eaton team."

Suppliers say: "Eaton is one of my most valued customers."

Values:

- Make our customers the focus of everything we do.
- Recognize our people as our greatest asset.
- Treat each other with respect.
- Be fair, honest and open.
- Be considerate of the environment and our communities.
- Keep our commitments.
- Strive for excellence.

Philanthropic Culture

Eaton strives to improve the environment and our communities. They encourage involvement in our communities to build a positive environment for the workplace, families and the world around us. They support efforts to improve the environment and are committed to do their share in creating and sustaining a "green world."

The Eaton Corporation has been a long-standing supporter of United Way Tar River Region, in addition to other local charitable entities within our communities. Not only is the Eaton Corporation striving for excellence in business, but also working collaboratively to create better opportunities within our two-county region.

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)

Eaton has a great philanthropic reputation in the Middlesex community. Every year during their United Way campaign, the Plant Manager, Tommy Stockdale, always prepares his famous chili to give to each employee who donates at least \$5.00 to United Way.

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.)

- Total campaign dollars increased by 12.6%
- Strong Leadership involvement
- Organized meetings with orderly dissemination of campaign materials

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

Though the employees at this Eaton facility are small in number, compared to other business entities in charitable ventures, their commitment to help those in need stretches far beyond. In addition to supporting United Way, Eaton supports several other non-profit/charitable organizations, including United Way partner agencies. Their participation in local community efforts consists of the following:

- American Heart Walk
- American Red Cross – hosting blood drives annually
- Substantial monetary donations and school supplies donations to local schools annually
- Great Leaps Program at Middlesex Elementary - volunteering
- Meals on Wheels - volunteering
- Monetary contributions to local Fire Departments
- Holiday Gifts Drive – providing needed items to low income, elderly and disabled
- Employees have served on the United Way allocations committee
- Tommy Stockdale's 9-year term as United Way Board Director and served as a 2010 Campaign Advocate
- Eaton Corporation has also provided a grant in support of United Way Tar River Region's local NC 211 program

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

For the last nine years, the management at the Eaton Corporation has played a significant role in engaging employees to support the efforts of United Way. Tommy Stockdale, Eaton’s Plant Manager, has been a local United Way Board Director beginning in 2006 until the present. Because of his involvement, United Way receives a corporate donation in addition to the funds raised during their United Way campaign. Mr. Stockdale’s enthusiasm about the impact of contributing to United Way has an awesome influence on the Campaign Coordinator and the employees of the Eaton Corporation. As a result, there has been an overall increase in their per capita giving.

Mr. Stockdale makes chili that employees who give at the care share level can enjoy for lunch on the day of the campaign. This year, the 2015 Eaton Corporate video encouraged employees to support United Way efforts. The employees were able to relate to the video in such a positive way by seeing their top leader sharing about the importance of donating to United Way.

United Way Staff members and Community Partners are invited to speak at the employee meetings to talk about the need and importance of supporting United Way.

Upon hiring new employees, the Eaton Corporation gives each employee an option to give to United Way through payroll deduction or by any other option that the company deems necessary. The information regarding United Way and other charities are discussed during more informal processes.

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*

Our local United Way Landmark Leadership levels are marked by a minimum-giving total of \$500. Those in managerial positions at the Eaton Corporation can usually be expected to donate at the Leadership level. The reasons Leadership Donors choose to contribute to United Way vary. However, they all share a common thread believing in the concept of investing in the local community to create better opportunities for today and the future.

Our United Way can continually depend on Eaton’s management to support the efforts of creating better opportunities in our community. The corporate Eaton facility leads by example for other Eaton plants across the United States. Doing so, a corporate United Way campaign video was produced by Eaton, which included the CEO spreading the message and encouraging employees to contribute to United Way. This awesome video was an awesome manner to engage employees to be a part of the “Live United” movement.

As previously stated Tommy Stockdale, Eaton’s Plant Manager, has served a 9-year term on the local United Way Board of Directors. He was also featured in the Snapshots of Success, which is a rotating photo exhibit that pairs United Way donors with a selection of recipients of the programs administered through the Partner Agencies. The compelling stories accompanying this pictures engages employees to give in order sustain the Health and Human Services programs.

All employees both past and present have an opportunity to be part of the culture of giving at Eaton.

Employee also serve as volunteers on Community Investment teams for United Way, as well as, as volunteers for Service Days.

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	60	7	11.6 %	75 %
2014	64	4	6.2 %	100 %
2013	66	2		

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.

The corporate Eaton facility leads by example for other Eaton plants across the United States. Doing so, a corporate United Way campaign video was produced by Eaton, which included the CEO spreading the message and encouraging employees to contribute to United Way. This awesome video was an awesome manner to engage employees to be a part of the “Live United” movement.

The corporate gift that Eaton gives to our local United Way is substantial. The gift for 2015 was \$7,068.88

Also, the Plant Manager served as a Campaign Advocate for many campaigns throughout our community. Campaign Advocates are a must for our campaign and having such a strong leader speak about the benefits of United Way truly made a difference in our campaign.

The dedication of the above resources to our local United Way shows that Eaton Corporation truly is a leader in supporting United Way.

Local corporate numbers are reported below unless indicated as statewide

Year	Corporate Gift	Percent Change
2015	\$ 7,068.88	12.6 %
2014	\$ 6,276.77	2.2 %
2013	\$ 6,141.34	

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

There is significant planning that fosters a successful campaign. This Eaton Corporation embodies that philosophy. Eaton's corporate facility leads by example in their support of United Ways across the world. Striving for excellence as it relates the environment and our communities is a value that Eaton uses as a catalyst for their campaign.

In concurrence with the corporate office, Eaton's Plant Manager meets with the Campaign Coordinator to discuss the official kick-off dates and other details. Each year the campaign coordinator begins early preparing, meetings to carefully disseminate campaign materials and spread the word regarding the efforts of United Way. Once they have finalized their plan, the Campaign Coordinator immediately contacts the local United Way to secure speakers and to gain the materials needed for dissemination. The success of Eaton's United Way campaign can be attributed to these details of their strategic planning process.

Unique, among other workplace campaigns within our two-county region, for the 2015-16 campaign, the Middlesex Eaton facility offered home cooked chili for anyone pledging a minimum of \$5.00 to United Way. Also, the Plant Manager cooked a gourmet lunch for the employees who signed up for Care Share Giving in the past.

In concurrence with the local United Way, Eaton uniformly extends gratitude to each employee for contributing to United Way. Also, gratitude is extended to Leadership Landmark donors and Care Share givers through United Way with a special letter from the Campaign Chair along with the Executive Director along with a Care Share Card; which is a card that includes discounts from several local businesses.

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*

Employees at Eaton Corporation know the importance of donating to United Way and supporting their local community. Despite the overall challenging economic times, employees gave at 80%. Effective leadership involvement and compelling stories from the United Way video and agency speakers were major factors that resulted in the increase in contributions. Empowering our donors to give is favorable for a successful campaign.

$\$21,206.63/75 = \282.75 per capita

Percentage change in employees from 2014 is 5.6%

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	\$ 21,206.63	12.6 %	75	\$ 282.75	6.6 %
2014	\$ 18,830.31	5.1 %	71	\$ 265.21	2.1 %
2013	\$ 17,913.12			\$ 259.61	

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***

Despite the changes in the economic climate of our country and especially our local community, the participation at Eaton Corporation is 80%! During regularly scheduled employee meetings, each employee is presented with an opportunity to give to United Way and know how important that it is to support their local community.

Eaton Corporation had an increase in staff from 71 employees in 2014 to 75 employees in 2015. There was percent change of 5.6%. For the 2015 campaign, 60 employees contributed to United Way; with 80% participation. Overall, Eaton's employee participation has increased significantly over the past several campaign seasons.

Upon hiring new employees, the Eaton Corporation gives each employee an option to give to United Way through payroll deduction or by any other option that the company deems necessary. The information regarding United Way and other charities are discussed during more informal processes.

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	75	5.6 %	60	-6.25 %	80 %
2014	71	1.5 %	64	-3.0 %	90 %
2013	69		66		96 %

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