

# 2016 Spirit of North Carolina Campaigning for Excellence



United Way  
of North Carolina

| Application Form                      |                                     |                                 |  |
|---------------------------------------|-------------------------------------|---------------------------------|--|
| Organization Name                     | Elliott Davis Decosimo, LLP         |                                 |  |
| Street Address                        | City/State                          | Zip                             |  |
| 700 East Morehead Street, Suite 400   | 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

| <b>Organization Employee Size</b><br><br><i>Check the appropriate box for this application submission.</i>   | <b>Type of Organization</b><br><br><i>Check the appropriate box for this application submission.</i>  |
|--|---|
| <input type="checkbox"/> Up to 25 employees<br><input type="checkbox"/> 26-50 employees<br><input type="checkbox"/> 51-100 employees<br><input checked="" type="checkbox"/> 101-200 employees<br><input type="checkbox"/> 201-500 employees<br><input type="checkbox"/> 501-1000 employees<br><input type="checkbox"/> 1001-1500 employees<br><input type="checkbox"/> 1501-2500 employees<br><input type="checkbox"/> 2501-5000 employees<br><input type="checkbox"/> 5001+ employees<br><input type="checkbox"/> | <input type="checkbox"/> Financial/Banking Institutions<br><input type="checkbox"/> Manufacturing<br><input type="checkbox"/> Business Campaign<br><input type="checkbox"/> City/ County Municipality<br><input type="checkbox"/> Higher Education<br><input type="checkbox"/> School Campaigns<br><input type="checkbox"/> Hospital/ Health System<br><input type="checkbox"/> Retail<br><input type="checkbox"/> Not-for-Profit Agency - 501(C)3<br><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**

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*Printed Name*

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*Signature*

*syoung@uwcentralcarolinas.org*

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*Email*

## Organizational Overview

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

### Describe the philanthropic culture of the organization:

Effective organizations embrace a culture of philanthropy. Elliott Davis Decosimo fosters a work environment for employees to get involved in their community, whether it is through a financial donation or a volunteer opportunity. Every office connects professional staff members to an organization they are passionate about and encourages them to hold a board seat or leadership role to build professional and community development. Many of our employees hold numerous board seats and contribute countless hours of service to their communities. Over the past 12 months, Elliott Davis Decosimo contributed more than \$190,000 to various community efforts in North Carolina. This amount does not include the \$69,000 raised from the United Way 2016 Campaign by the Charlotte office.

Our impact reached farther than it ever has this year. Our Charlotte and Raleigh offices volunteered nearly 5,000 hours in their communities as tutors, treasurers, financial coaches and board members. A few of the associations Elliott Davis Decosimo employees are involved in are the United Way of Central Carolinas, Classroom Central, Communities in Schools, KinderMourn, Charlotte Family Housing, The Harvest Center, Habitat for Humanity and Boy Scouts of America.

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### 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.

Throughout every campaign, a priority is to continuously raise the bar in firm contributions and increase community awareness year-over-year. During our 2016 campaign, we went in a new direction and integrated an innovative campaign strategy called the *Daily Connection*. The purpose of the *Daily Connection* ensured that our two week campaign did not simply ask for monetary donations, but gave our employees a chance to see the value of their contributions and the impact they have on the community.

During our 2016 campaign, volunteer opportunities and the *Daily Connection* tied back to United Way's message to "create a change for those most in need". With our campaign taking place just before Thanksgiving, the thought of how much it would cost to feed a family of four sparked our *Feed a Family* demonstration. This demonstration was to create a mock grocery list of the basic needs for food and drink. It was eye opening to our professionals that our grocery list was more than double the \$30 amount that A Child's Place program budgets. We truly believe that a more accurate depiction would be 5-6 times that amount.

Other Daily Connections included:

- Volunteer event at Charlotte Family Housing
- Putting contest within the office, including United Way facts & the Poverty Simulation
- Hunger Challenge introduction and education
- "Find Your Way: A Roadmap to Community Involvement" lunch and learn at the Goodwill Opportunity Campus
- Volunteer event in the office, packing more than 700 snack packs

**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? No
  - 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? No

**Up to 5 points**

Being a leader and supporting our communities is a crucial component to the development and success of our people. At Elliott Davis Decosimo, we are encouraged to contribute time to not-for-profit organizations as volunteers, leaders and visionaries in our communities.

Elliott Davis Decosimo's firm mission statement is, "to make a positive impact on our clients, our people and our communities." This is demonstrated through the support and encouragement of leadership, which allows employees to volunteer during business hours and Elliott Davis Decosimo will continue to pay normal wages. Community service and volunteering are an investment to the community and the people who live in it.

We work in collaboration with the community to solve problems by becoming deeply involved in both a volunteer and board capacity. Elliott Davis Decosimo supports the time and work outside of the office to learn the needs of our community, develop a plan of action to address those needs and execute. We consistently encourage and challenge our employees to take their volunteerism and philanthropic efforts to the next level to ensure they are making the most of their time and monetary investment.

We have volunteers and board members involved in several United Way partner agencies. To name a few, some examples are as follows:

- A Child's Place
- Boy Scouts of America
- Communities in Schools
- Girl Scouts Hornet's Nest Council
- The Learning Collaborative
- KinderMourn
- American Red Cross
- Mental Health Association of Central Carolinas
- YMCA of Greater Charlotte
- Habitat for Humanity
- The Relatives

All employees are encouraged to engage in volunteer work based on their passions. We see the value and importance of being involved and serving the community in a variety of ways. Making our communities that we live in a great place to work, grow and thrive is continuously a priority for the firm. We feel that giving back and becoming part of a positive change is a necessity and privilege. As our firm continues to grow, emerging ourselves in the communities of our new markets has allowed us to build great connections within the business community. When you volunteer alongside other professionals, you begin to build a mutually beneficial relationship both personally and professionally.

**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***

Elliott Davis Decosimo spends countless hours and numerous resources supporting the United Way to raise community awareness and foster a spirit of giving. From simple canned food drives to tiny library builds and serving lunch at the Men’s Shelter, we work to provide an easily accessible platform for our employees to get plugged in.

In 2016, we had groups attend a wide variety of United Way events, to name a few:

- Strike Out Hunger at BB&T Ballpark
- Canned Castle Build at the Tool Bank
- KinderMourn’s summer camp
- KinderMourn’s annual Hope Floats Duck Race
- LINC’s annual cornhole tournament
- 2 separate tiny library build days

We also created a lunch and learn during our campaign which was designed specifically to educate and encourage everyone in our office of the different affinity groups and ways that they can get plugged in regardless of their passion or time constraints.

In addition, we have spoken at multiple United Way sponsored events, including the Campaign Cabinet panel to educate companies on campaign tactics and help others take their campaigns to the next level. Also, we spoke at “Hacks with Hearts,” an event specifically for the advertising community that educated and raised awareness of having a United Way campaign and getting those within your office more involved.

Currently in the planning stages for 2017, we will execute a day of service – tied to our campaign kickoff and also have scheduled quarterly community service opportunities for the entire office.

### 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

Before our campaign begins, garnering leadership buy-in is essential to its success. Influence and support from senior leadership plays a large role during our campaign activities. Ensuring an enthusiastic tone is conveyed from leadership during our campaign encouraged greater participation furthering our culture of giving back. That tone resulted in nine new leadership level giving employees, for a total of 26 leadership level donors, and one Tocqueville Society donor. The visibly increased commitment from leadership played a large role in our 2016 campaign success. With the full support of leadership, our campaign has grown 380% over the past five years.

During our campaign, senior leadership participated in any capacity they could. They raffled off their highly valued shareholder parking spots for two weeks and donated items to our silent auction. In addition, they were great sports in allowing us to “pie” them in the face when we met our stretch goal (over \$15,000 more than the previous year). For every \$1,000 over our initial goal, an additional shareholder would get pied in the face. We ended up being able to pie four shareholders at our wrap up party!

Our Shareholder group hosts a private dinner for those who gave at the \$1,000 leadership level and their significant others. This year, we hosted nearly 40 people at Vivace for an evening of fun, celebration and thanks.

Leadership promotes a culture of giving by providing our team the time and support needed to volunteer. Volunteerism and giving is a part of our culture and mission. During the goal setting process, each employee discusses with their manager how volunteering in the community fits into their overall goals of furthering the firm’s mission of “making a positive impact on our communities”. Senior leadership consistently communicates setting a good example and providing inspiration to staff to get involved in their communities.

In addition to the United Way, each office takes pride in its involvement with projects and organizations on a more local level. At Elliott Davis Decosimo, all firm professionals are encouraged to contribute time as volunteers or leaders to not-for-profit organizations.

#### 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 | 112 (100% participation) | 26                     | 23.21%                 | 8.43 %                        |                |
| 2015 | 115 (100% participation) | 17                     | 14.78 %                |                               |                |

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.

One factor that affects the leadership level of our office is the age demographic of our employees. 70% of employees are under the age of 40 and 43% of employees are under the age of 30. This allows us great opportunity to build our donor base and get employees engaged at a young age. We have very strong engagement in both United Way Young Leaders and LINC. This age demographic will continue to grow our campaign donations and increase our leadership level donors over time.

**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.*

Elliott Davis Decosimo places the United Way at the top of the list of philanthropic participation and support. We have named the United Way as our firm-wide philanthropy and raised nearly \$500,000 in 2016 through our office campaigns. Offices hold a fundraising campaign with themed events, presentations and field trips to local United Way agencies. Educating our people about the needs in our communities has resulted in achieving 100% participation from our employees.

In our Charlotte office, we have three people heavily involved with the United Way. Sarah Hopfer has served on the United Way Young Leaders board for the past five years and is now transitioning to the Board of Directors in 2017. With this transition, Stev Davitte has been named to the United Way Young Leaders board. After years of involvement with UWYL, Carlston Mills has been accepted to the LINC board and is looking forward to getting more deeply involved on a more official level.

Local corporate numbers are reported below unless indicated as  statewide

| Year | Corporate Gift | Percent Change |
|------|----------------|----------------|
| 2016 | \$69,336.28    | +37.82%        |
| 2015 | \$50,309.83    |                |

*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

Teamwork is the key to success. This year, a committee of approximately 10 people collaborated to make this our most successful campaign yet. Sarah Hopfer, 2016 campaign chair, has led the campaign committee for the past five years and serves on the United Way Young Leaders and UWCC Board of Directors. Each committee member was recognized within the workforce for their investment of time and resources by our Office Managing Shareholder, Richard Battle at both the wrap up and kick off events. At the conclusion of the campaign, our Office Managing Shareholder wrote thank you notes to each committee member which was a wonderful personal touch. Those who spent a significant amount of time on the campaign were also thanked for their efforts with a Visa gift card.

Sub Committees Include:

- Silent auction – Responsible for soliciting silent auction items from our leadership
  - o Shareholders, Directors and Senior Managers donated to the silent auction with items such as an Apple watch, rounds of golf at Myers Park Country Club, Carolina Panthers tickets, suites at the Hornets games, date nights to a play with restaurant and hotel accommodations, etc. The silent auction brought in nearly \$4,000 to help take our campaign to the next level.
- Communications – The creation of a hype video, “The Game Plan” got the office excited to kick off the campaign. Postcard schedules were placed on each employee’s desk with activities detailed for the week. Email communications were delivered to keep the office updated on the status of our overall donation goal.
- Kick Off Party – Planned our kickoff event which was a tailgate party hosted outside our office in the parking deck with a catered lunch, games and speaker.
- Wrap Up Party – Planned our wrap up party celebration at Piedmont Social House with an afternoon of bowling and fun with our office.
- Daily Connection – Worked to tie everything that we did back to the mission of the United Way, creating additional touch points throughout the campaign.

On the morning of our campaign kickoff, we sent an email to the entire office that was both funny and serious – it was intended to get everyone excited about the campaign, involved in the preparation and drive home the point and purpose of the campaign. We went around the office and filmed many of our employees saying “Live United” via Snapchat. We then spliced this together with the United Way’s campaign video for 2016 and the combination had a powerful message. Our campaign committee also came in early to decorate each employee’s desk and our office as a whole to get everyone excited and in the spirit!

Our kickoff event was a tailgating lunch that was a very fun gathering, we had Ryan Grammatico from Right Moves for Youth come speak. The personal connection that Ryan has with the United Way and his passion and excitement for the organization really moved people. Our employees were able to see the impact that their dollars can have and the tangible results that they are helping people in our community get on track to better their lives. On the first Wednesday of our campaign, we did a *Feed a Family* demonstration, allowing us to see the power of a dollar with the United Way and that while realistically to feed a family of four over the holidays. While a typically holiday meal for a family of four would be between \$100 - \$200, A Child’s Place manages to feed families for only \$30.

On the first Friday our campaign, we had a putting contest within the office. Each participant paid \$5 to play and we incorporated the Poverty Simulation into each hole. At each hole, you had to make a decision based on your situation and what the simulation asked for. This was very eye opening to many and a great way to remind people of the decisions that many families have to face each day. Also on that Friday, we had more than 20 volunteers go to Charlotte Family Housing where we cleaned up outside, helped children with homework and provided dinner for all of their families.

The following week we introduced the Hunger Challenge which educated people about what a food stamp budget really looks like, \$4.00 per day. This budget brings challenges in regards to hunger and health. In addition to this, we hosted nearly 25 people at a Lunch and Learn held at the Goodwill Opportunity Campus to allow everyone an opportunity to learn more about the different ways they can get engaged at the United Way and the different affinity groups that are active. Multiple people went in the system and increased their pledges after this lunch and learn to ensure that they met the monetary requirement to be included in these affinity groups. Last but not least, we did a snack pack volunteer event in our office in which we packed 725 snack packs that were later distributed to the Boys and Girls Club.

## 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

Strategically, we focus on encouraging people to give whatever amount is meaningful to them. We also do demonstrations to show how far their dollar can go or for example, if you skip one cup of \$5 Starbucks – that could have been five books in the hands of children in need.

We show a suggested giving level on the initial email from the United Way that has been calculated with the help of our human resources department based on the salary range for each level. We have found that by showing the suggested giving levels, our donor base has stepped up to that particular level and given more than they historically have without it.

We also believe that showing the breakdown per month has shown people who may have only given \$100 per year that if they go up to \$250, that is really only approximately \$20 per month. Showing our team this information in smaller, more bite sized pieces has shown great success in increasing our overall per capita gift.

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 | \$ 69,336.28                 | +37.82 % |                | 112                              | \$ 619.07           | 41.51%   |                |
| 2015 | \$ 50,309.83                 |          |                | 115                              | \$ 437.48           |          |                |

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

The expectation for participation level has been set by our firm and our Office Managing Shareholder. For the past five years, we have had 100% participation. The campaign is something that our office looks forward to and rallies around. We ensure that everyone has an opportunity to give through multiple channels and ensuring that we educate people along the way as to what their money will be used for and how the United Way can make their dollars stretch much farther than they can. We allow opportunities for not only your pledge but also to give smaller amounts through purchasing jeans day passes, putting contest registration, etc.

Throughout the campaign, the campaign committee sends updates every three days as a reminder at the bottom of the daily connection. It shows how far we are from our goal and all of the upcoming opportunities to get plugged in. If things get down to the wire with a few people who have not yet pledged, the Shareholder that is in charge of that person will reach out to them with a gentle reminder – this is very much the exception. Our Shareholders are very clear yet supportive that everyone is expected to donate at whatever level is meaningful for them, whether that is \$1 or \$1,000.

Also to ensure that all employees have an opportunity to participate, most all of our activities are during working hours and if they are outside of working hours, they are not required. Our kickoff party, wrap up party, putting contest, snack packs volunteering, etc were all during normal business hours to ensure everyone has the opportunity to participate regardless of their personal schedules. The majority of our new hires have interned with us in the past and been exposed to our culture and community service. Throughout their internships, they spend one afternoon each week volunteering at a local not-for-profit and learning about the various needs of our community. We introduce this at the very beginning of their experience with our firm.

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 | 112                  | -2.61%   | 112                    | -2.61%   |                | 100%            |                |
| 2015 | 115                  |          | 115                    |          |                | 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**

## Standard 4 (Campaign Social Media Presence)

**Elliott Davis Decosimo**  
November 16, 2016 · 🌐

Our Charlotte United Way campaign far exceeded our expectations this year! With 100% participation, nine new leadership level donors and jeans coupons purchased for maximum office comfort, we surpassed our pledge goal \*and\* served up some special pies at our wrap-up party!

Thank you to United Way of Central Carolinas - Young Leaders & LINC for all of your support and to everyone in the Charlotte office. #GameOnCLT #LiveUnited #GivingTuesdayCLT



229 Views

**Elliott Davis Decosimo** added 4 new photos — with Jenna Wise and 2 others.  
October 31, 2016 · 🌐

Friday marked Charlotte's United Way of Central Carolinas campaign kick off! Stay tuned for the final score on November 11. Thank you to Ryan from Right Moves for Youth for coming out and giving our team insight about the impact of our dollars. #GameOnCLT



Like Comment Share  
Jenna Wise, Jeff Bromfield and 8 others Chronological

**Right Moves for Youth** It was our honor to witness the powerful impact that an amazing company is having in this community  
Like · Reply · 2 · November 1, 2016 at 10:51am

**Elliott Davis Decosimo**  
November 11, 2016 · 🌐

Our Charlotte office is wrapping up their United Way campaign by delivering more than 500 snack packs to the Boys and Girls Clubs of Greater Charlotte! Doing good feels good, and we can't wait to find out we make our pledge goal and receive 100% participation at the wrap-up party! #LiveUnited #GameOnCLT



Love Comment Share

You, Jenna Wise, Kristen Fabian and 10 others Chronological

2 shares

**Boys and Girls Clubs of Greater Charlotte** Yum Yum....Thank you for your generosity.  
Like · Reply · 1 · November 11, 2016 at 2:56pm