

# 2016 Spirit of North Carolina Campaigning for Excellence



United Way  
of North Carolina

Application Form			
Organization Name	First Tennessee Bank		
Street Address	City/State	Zip	
2000 W. First Street	Winston Salem	27104	
Name of Person Completing Application	Phone	E-mail	
Kevin Nunley Angie Murphrey	(336) 703-6835	knunley@ftb.com	
Name of Sponsoring United Way	United Way of Forsyth County		

## 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>  <i>Check the appropriate box for this application submission.</i>	<b>Type of Organization</b>  <i>Check the appropriate box for this application submission.</i>
<input checked="" 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 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 checked="" 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 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:**

Cindy Gordineer

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*Printed Name*

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*Signature*

Cindy.Gordineer@uwforyth.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:

First Tennessee Bank, NA (NYSE: FHN) is a regional financial services company with a long history of success and tradition dating back to 1864. From the bank's creation during the Civil War to today, First Tennessee has remained a pillar of strength & stability while remaining committed to our employees and exceptional customer service.

In 2014 we celebrated 150 years of continuous operation. Our commitment to people during these many years – customers, employees and citizens of the communities we serve – has been the driver of our longevity and success. The highlight of our 150th anniversary celebration was our foundation's 150 Days of Giving campaign, which divided \$750,000 among 150 nonprofits across our footprint, reaffirming our legacy of community investment.

Our commitment to people also continues to earn the bank national recognition:

- Named one of the Top 50 companies for Executive Women in 2009, and 2012-2015 by the National Association for Female Executives
- Recognized as one of the Top 100 companies for working mothers by Working Mother magazine in 2015 for the 21<sup>st</sup> consecutive year.
- Named a Top 100 adoption friendly workplace each year since 2009 by the Dave Thomas Foundation
- Recipient of a 2015 Hermes Platinum Award for community investment and social media campaigns related to First Tennessee Foundation's 150 Days of Giving.

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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.

During the course of the 2016 fall campaign, we reviewed the success of the United Way's 10-year plan to end chronic homelessness. Andrea Kurtz of the United Way was energizing as she spoke about the initiative and its success in the community. Many were surprised to hear how the plan was created and what had been done to make it successful. It was good for our team to hear about a program/use of individual donations and the success that comes from community support.

Additionally, during the opening event and during the campaign, our group was introduced to other facts and stories. Our group had the chance to view the new United Way video highlighting the organization's mission and the way it is designed to help. We also heard stories of others in the community that have benefited from United Way Organizations such as the Food Bank and Triad Community Kitchen.

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### List 3 bullet-points highlighting numeric campaign success:

- 100% participation- - proudly achieved each year at First Tennessee
- Outstanding per capita giving level of \$1,395
- 40% of donors are at the Leadership level

**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**

All First Tennessee employees are encouraged to participate in the community and many serve on numerous volunteer boards and committees including:

- Amos Cottage
- Appalachian State University Foundation
- Arbor Acres Board
- Arts Based School
- The Augustine Project
- Brenner's Children's Hospital
- Boy Scouts of America
- Carolina Chapters of the National MS Society
- Centenary United Methodist Church
- The Children's Museum of Winston Salem
- Community Education Collaborative
- Forsyth Humane Society
- Hospice & Palliative Care Center
- Leadership North Carolina
- Leadership Winston-Salem
- Matthew A. Gfeller Sports Safety Spectacular
- New Philadelphia Moravian Church
- Ronald McDonald House
- St. Paul's Episcopal Church Outreach
- Salem College & Academy Board
- SciWorks
- Second Harvest Food Bank
- Stratford Rotary
- Summit School Board
- Triad Stage
- UNCG Alumni Association Board
- UNCSCA Foundation Board
- United Way
- The West End Association
- William G. White YMCA
- Winterlark Committee, WFUBMC Cancer Patient Support Program
- Winston-Salem Rotary

**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 2014, First Tennessee celebrated its 150<sup>th</sup> anniversary and an instrumental element of our legacy involves giving back to the communities in which we do business. First Tennessee believes strongly there is a responsibility to ensure “the bones” of those communities are strong. First Tennessee employees volunteer time and resources at many of the United Way partner agencies across the Triad. Our employees carry a high amount of enthusiasm for giving back to the community in many different ways. As mentioned in other parts of the application, the United Way constitutes the only annual campaign held in the Triad office. The campaign is always met with enthusiasm and many look forward to the activities around the campaign each year. The spirit of the United Way is analogous to First Tennessee Bank’s commitment to building communities and improving financial access and health through Operation Hope and other initiatives. All other events and programs throughout the year are purely educational with the United Way being the only agency supported as a group out of the Triad office of First Tennessee.

### 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

A gift of \$1,000 or more is considered a leadership gift.

Our local leader John Fox is a very strong supporter of United Way and is an Alexis de Tocqueville member through the Innovators match program. He is also on United Way’s Board and is chairperson for the 2016-2017 United Way Campaign.

In 2009, John participated on United Way’s Campaign Cabinet as the Vice Chair for the Finance and Real Estate Division. This division exceeded their goal of \$170,000 by \$10,000 with \$180,000 raised!

In 2010, John served on United Way’s Campaign Cabinet again, overseeing the Winston Division which includes companies who raise a minimum of \$40,000 and this division successfully achieved its goal at \$515,000.

In 2011 and 2012, he served as the Chair of the Alexis de Tocqueville Society.

John continues as a board member of the United Way of Forsyth County. From hearing about the unique “Place Matters “ initiative being launched at United Way, John suggested the tour of the neighborhoods as the kickoff for the 2015 First Tennessee campaign.

In 2016 John broadened his strong service to United Way by serving as the Chairman of the 2016 Community Campaign for UW of Forsyth County.

John and his direct reports participate in all aspects of our UW campaign. Each year, one of his direct reports chairs our campaign working with colleagues to create greater awareness of community need while introducing an element of fun to the process.

John and the leaders on his team promote a culture of giving through the visibility of their community involvement as evidenced in Standard 1, and through the events (too numerous to list here) hosted by those organizations (see Std. 2).

#### 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	23	9	39%	0%	
2015	26	10	39%		

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.

2016 saw a reduction in the total number of employees in the Triad Office. As new employees come on board to replace retirees, it will take a year or two to ramp back up in leadership giving.

#### **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.**

A gift of \$1,000 or more is considered a leadership gift.

Our local leader John Fox is a very strong supporter of United Way and is an Alexis deTocqueville member through the Innovators match program. He is also on United Way’s Board and has committed to serving a 3 year term.

In 2009, John participated on United Way’s Campaign Cabinet as the Vice Chair for the Finance and Real Estate Division. This division exceeded their goal of \$170,000 by \$10,000 with \$180,000 raised!

In 2010, John served on United Way’s Campaign Cabinet again, overseeing the Winston Division which includes companies who raise a minimum of \$40,000 and this division successfully achieved its goal at \$515,000.

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John continues as a board member of the United Way of Forsyth County. From hearing about the unique “Place Matters “ initiative being launched at United Way, John suggested the tour of the neighborhoods as the kickoff for the 2015 First Tennessee campaign.

In 2016 John broadened his strong service to United Way by serving as the Chairman of the 2016 Community Campaign for UW of Forsyth County. He attended countless campaign kick-offs and was the keynote speaker at all he attended. John made his schedule open to participate in such in order to make the 2016 campaign as successful as possible. He has spent hours on the phone speaking with community leaders about their gifts and has made himself accessible to the Resource Development staff.

John and his direct reports participate in all aspects of our UW campaign. Each year, one of his direct reports chairs our campaign working with colleagues to create greater awareness of community need while introducing an element of fun to the process.

John and the leaders on his team promote a culture of giving through the visibility of their community involvement as evidenced in Standard 1, and through the events (too numerous to list here) hosted by those organizations (see Std. 2).

Local corporate numbers are reported below unless indicated as  statewide

Year	Corporate Gift	Percent Change
2016	\$13,587.50	-10%
2015	\$15,102	

*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***

- Kevin Nunley and Jae Walser were Co-Chairs of the 2016 campaign and planned a creative and highly successful campaign.
- Kevin and Jae met with Leigh Anne Groves of the United Way to discuss the campaign and to learn about options for a successful campaign. In keeping with past years, the design was for a total one week plus one day event with a kick off meeting occurring on Friday and the wrap up on a Monday.
- In a subsequent meeting, Jae and Kevin decided to highlight the United Way's 10 year plan to end chronic homelessness. Leigh Anne assisted in arranging to have Andrea Kurtz attend the opening meeting.
- Employees were notified about the campaign kickoff via e-mail. The kickoff meeting went well with 19 out of 23 participants attending. Andrea gave a wonderful presentation on the 10-year plan and its success to-date. Leigh Anne also provided great information about the United Way in general and shared the new United Way video. The meeting included breakfast for all employees – supplied by Kevin and Jae.
- During the campaign, Kevin Nunley tracked total pledge participation (via e-pledge) and updated the group at times throughout the campaign with reminders. Two days prior to the end of the campaign, Kevin provided gelato after lunch for all employees and provided a reminder about the close of the campaign. The final day of the campaign allowed the two last participants to come in (including one new employee moving from Raleigh). Kevin followed up on Wednesday with an email highlighting 100% participation for the year.

### 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**

Having a small employee base means any change in the staff year-to-year could have a material impact on our campaign metrics. Though total number of full-time employees may only vary by one or two people, on occasion we may lose an experienced employee and gain a first-time worker. The constancy of our team's commitment to the United Way, and by extension the community, is emblematic of our cohesiveness and shared vision. This year's results were lower than last year's due mainly to two factors - - the absence of one large contribution from the previous year and three fewer employees. Even with the loss of one large contributor, the group had an increase in per capita gift for the year.

We take time from our daily work regimen to acknowledge how important our community is to us and how every contribution, no matter how small, can make a difference.

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	\$27,175	-10%		23	\$1,181	2%	2.5
2015	\$30,203			26	\$1,162		

*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

United Way, the agencies they serve as well as other worthy local causes are strongly supported by First Tennessee.

As an organization, we believe that our success is tied directly to the strength of the communities we serve. First Tennessee leverages our brand exposure through promotions and sponsorships that support organizations which serve our local communities. In Winston-Salem, our service to the community takes the form of corporate financial support, employee financial support and most notably employee volunteerism.

A desire to give back is a defining characteristic of the employees who work here. We seek not only to participate in philanthropic activities but to follow our personal convictions and become a true catalyst for meaningful positive impact in the lives of those around us. We support and invest in a way that responds inclusively to needs and promotes progress and prosperity across our region.

This is encouraged by an executive team who leads by example, committing their own time and resources to causes that speak to their personal convictions. One example noted earlier is John Fox's commitment to the United Way in particular. He personally supports the organization at the de Tocqueville level and provides support as a United Way Board member and through Cabinet Leadership. His leadership provides the cornerstone for the exceptional results achieved by our organization. Perhaps the size of our team plays a role, but the shared understanding of what giving back means enhances our success. Employees are given the opportunity to participate, but their level of participation demonstrates this understanding.

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	23	-12%	23	-12%		100%	
2015	26		26			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**