

2015 Spirit of North Carolina Campaigning for Excellence

Application Form <i>(www.unitedwaync.org)</i>			
Company/Organization Name	First Tennessee Bank		
Address	2000 W.1 st Street	City/State	Zip
		Winston Salem NC	27104
Name of Person Completing this Application	Angie Murphrey Jason Marley	Phone 336-703-6829 336-703-6809	E-mail amurphrey@ftb.com jmarley@firsttennessee.com
Name of Sponsoring United Way	United Way of Forsyth County		Metro Size 3C
United Way Contact for Questions	Don Wasowski	Phone 336-721-9353	E-mail don.wasowski@uwforsoyth.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 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: two new items!</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 Anita Barker, 875 Walnut Street, Suite 150B, Cary, NC 27511. DVD's must arrive on or before January 19, 2016.</p>	

AWARD CATEGORIES

<p style="text-align: center;">Organization Employee Size</p> <p style="text-align: center;"><i>Check the appropriate box for this application submission.</i></p>	<p style="text-align: center;">Type of Organization</p> <p style="text-align: center;"><i>Check the appropriate box for this application submission.</i></p>
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Up to 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 	<ul style="list-style-type: none"> <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:

Don Wasowski

Email:

don.wasowski@uwforyth.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:

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 21st 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.

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)

Embracing United Way of Forsyth County's "Place Matters" initiative (in 13 specific Winston-Salem neighborhoods) we chose to add this as a focus of our campaign. The targeted area includes several communities in East Winston-Salem. As part of the campaign kickoff, our employees were taken on a bus tour of the area as a means of bringing to life the urgent need for investment and commitment to these communities. We were accompanied on the tour by Bret Marchant and Eric Aft from the Community Planning and Investment team at United Way. The tour was an effective way to show many on our team a side of their city with which they have had little to no experience, and to highlight the ways in which United Way targets its initiatives for the greatest community impact.

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.)

- 100% participation- - proudly achieved each year at First Tennessee
- Outstanding per capita giving level of \$1162
- 39% of donors are at the Leadership level

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

First Tennessee employees are encouraged to participate in the community and 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
- UNCSA Foundation Board
- United Way
- The West End Association
- William G. White YMCA
- Winterlark Committee, WFUBMC Cancer Patient Support Program
- Winston-Salem Rotary

***An estimated value of volunteer time is:
2587 Volunteer Hours = \$58,336.85***

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

In 2014, First Tennessee celebrated its 150th 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 and care is given for the needs of the common man. Our bank supports/sponsors numerous events during the year with the most notable being:

- Big Brothers Big Sisters, Bowl for Kid's Sake Sponsor
- Brenner's Children's Hospital, Cheers! Event Sponsor
- Boy Scouts of America, Dinner Sponsor
- Central Chapter of the National MS Society, Luncheon Presenting Sponsor
- Children's Museum of Winston-Salem, Storybook Soireeee Sponsor
- Crisis Control, Sponsor
- Enrichment Center, 30th Anniversary Dinner Sponsor
- Golfers Against Cancer, Gold Sponsor
- Habitat for Humanity, Sponsor
- Hospice and Palliative Center, Sponsor
- iCan House, Luncheon Sponsor
- Juvenile Diabetes Research Foundation, Gala Sponsor
- Matt Gfeller Foundation, Dinner Sponsor
- Old Salem Museums & Gardens, Event Sponsor
- River Run International Film Festival, Sponsor
- Ronald McDonald House, Character Breakfast Sponsor
- Sci Works Where Innovation Begins, Sponsor
- Second Harvest Food Bank, Sponsor
- The Winston-Salem Foundation, Luncheon Sponsor
- Wake Forest University Cancer Patient Support Program, Winterlark Event Sponsor
- Senior Services, Alzheimer Dinner Sponsor
- Winston Salem Street School, Eat for the Street Oyster Roast
- Crosby Scholars, Gold Tournament Sponsor
- Reynolda House Museum of American Art, American Moderns Exhibition Sponsor
- Augustine Project for Literacy
- Samaritan Ministries, Capital Campaign

Standard 3 - CEO/Senior Leadership Involvement and Giving

Given that Leadership participation is a Best Practice item: Describe how senior leadership (CEO/Direct reports) hosts, manages, organizes, participates in, and “influences” philanthropy, community support, and campaign activities. Describe how company leadership in general promotes a culture of giving. Specific events that are sponsored (and led) by the leadership team should be noted. Complete the leadership giving table below.

Up to 10 points*

A gift of \$1,000 or more 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.

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 will broaden 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).

Year	Total Number of Givers	Number of Leadership Givers	% of Leadership Givers	Percent Change
2015	26	10	39%	-9%
2014	28	11	39%	-15 %
2013	27	13	48%	

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.

United Way is one of the first, if not the first, introductions to community engagement most of this management experienced early in their career. As a result, their commitment to the United Way, its mission and its programs has been long and foremost among their community activities.

The United Way Campaign is the exclusive (only) community engagement activity in which we ask all employees to participate, recognizing the personal nature of giving, but strongly believing in the mission, spirit and efficiency of the organization. In addition, the annual campaign and the extracurricular activities in which we engage add to the strong sense of team shared by our employees. To support United Way and encourage employee participation, First Tennessee matches employee donations on a 50% basis.

We share the positive nature of our partnership with United Way (campaign success, activities and awards) in internal communication and externally. Many of our UW campaign activities and results are shared on our intranet through pictures. We also display our UW relationship on our story boards in our conference room for all who meet there to see. Finally, during 2014, as part of our 150 year anniversary, we highlighted our most significant community partners, which included United Way, on an electronic billboard along Business 40 near Baptist Medical Center.

Year	Corporate Gift	Percent Change
2015	\$15102	-15%
2014	\$17701	+6%
2013	\$16683	

Percentage change example: 2014 minus 2013 divided by 2013.

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

- Jason Marley and Kim Pace were the Co-Chairs of the 2015 campaign and planned a creative and highly successful campaign.
- Jason and Kim met with past chairs Angie Murphrey, Haywood Edmundson and Christine Bland to discuss elements of their success on past campaigns. During the “ CEO Call” for the campaign, John Fox suggested that the campaign kickoff meeting consist of a tour of the “ Place Matters “ neighborhoods (a new United Way initiative in 13 specific neighborhoods in Winston-Salem).
- Leading up to the kickoff of the campaign, information was shared with employees about various community issues impacted by United Way’s work in Forsyth County (e.g. childhood obesity, graduation rates, homelessness, financial stability etc.).
- Employees were notified about the campaign kickoff via e-mail. As noted, in lieu of the traditional employee meeting, a bus tour was conducted in the “ Place Matters “ neighborhoods scheduled at the end of the work day. Before the tour, Bret Marchant and Eric Aft from United Way conducted a presentation in our conference room with various information on “ Place Matters” to provide our employees a frame of reference. The tour left from our offices and traveled through the “Place Matters” neighborhoods in East Winston-Salem. Bret and Eric narrated the tour, providing insight and anecdotes about United Way activity in each locale.
- During the campaign, Jason Marley tracked total pledge participation (via e-pledge) and updated the group at the conclusion of the campaign on achieving another 100% participation rate for 2015.

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*

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 two fewer employees. Factoring out the large contribution, the fewer number of employees donated slightly more than they did in 2014.

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.

Year	Total Employee Giving Amount	Percent Change	Total No. of Full-time Employees	Employee Per Capita	Percent Change
2015	\$30203	-15%	26	\$1162	-8%
2014	\$35402	+6%	28	\$1264	+2%
2013	\$33367		27	\$1235	

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***

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 health 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.

Year	Total Number of Employees	Percent Change	Total Number of Givers	Percent Change	Percent Participation
2015	26	-7%	26	-7%	100%
2014	28	+4%	28	+4%	100%
2013	27		27		100%

Employee % change - 2015 number of employees minus 2014 number of employees divided by 2014 number
Givers % Change – 2015 number of givers minus 2013 number of givers divided by the 2013 number