

# 2016 Spirit of North Carolina Campaigning for Excellence



United Way  
of North Carolina

Application Form			
Organization Name	FirstHealth of the Carolinas, Inc.		
Street Address PO Box 3000, 155 Memorial Dr.	City/State Pinehurst, NC	Zip 28374	
Name of Person Completing Application	Wes Cowell & Chris Miller	Phone 910-715-1093 & 910-715-5467	E-mail mcowell@firsthealth.org cpmiller@firsthealth.org
Name of Sponsoring United Way	United Way of Moore 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 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 checked="" type="checkbox"/> 2501-5000 employees <input type="checkbox"/> 5001+ employees	<input type="checkbox"/> Financial/Banking Institutions <input type="checkbox"/> Manufacturing <input type="checkbox"/> Business Campaign <input type="checkbox"/> City/ County Municipality <input type="checkbox"/> Higher Education <input type="checkbox"/> School Campaigns <input checked="" 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:**

Linda Pearson

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*Printed Name*

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*Signature*

linda.pearson@uwaymoore.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:

FirstHealth of the Carolinas (FirstHealth) is a comprehensive health care system based in Pinehurst, North Carolina. The 2015 United Way campaign occurred in system's four hospitals in Hoke, Montgomery, Moore, and Richmond Counties. "To care for people" is the FirstHealth organization's core purpose, and it's supported by the 2020 Vision—"working together, first in quality, first in health"—a phrase that not only summarizes how we care for people but also offers a pledge to the future.

- Working together: The organization is large and capable, but it works best when it works with others through hundreds of partnerships and dozens of task forces throughout the entire service region. The hospital system can accomplish a lot, but so much more by working with others.
- First in quality: While primarily a manifestation of the excellent medical care provided by medical providers and staff, this component of the 2020 Vision applies to all community services.
- First in health: The system works to help the communities served to be as healthy as possible. That aim begins with education, is achieved with support and resources, and is delivered by a dedicated and highly trained staff.

Fundamentally, "working together" to be "first in quality" and "first in health" brings us closer to achieving the lauded goal of lower health care costs. It also makes our region more attractive to new businesses, new families and increased economic development.

A sign of the organization's philanthropic spirit is through its community benefit program. In FY14 (FY15 analysis being conducted at the time of award submission), FirstHealth provided Community Benefit with a value of over \$43 million which included over \$29 million for charity care and non-reimbursed costs for Medicaid patients. FirstHealth community benefit includes not only charity care for patients but also community programs targeting the regions underserved including but not limited to community health promotion/disease prevention classes, dental health programs for youth, a tobacco use prevention and cessation program, transportation services, and a medication assistance program.

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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.

One of the keys to the organization's success in its campaigns is variety. The campaign committee's goal is to make sure the campaign stays fresh and not routine. By generating a fresh campaign each year, it renews interest by staff and provides heightened awareness of the organizations supported by the United Way in our region. Department Captains for each department are exposed to presentations from partner agencies during annual training in order to share meaningful information to all staff.

Additionally, department Captains for each department are evaluated on their campaign participation performance. Thanks to FirstHealth's online tracking system, all captains can be reviewed to make sure they are not stretched too thin by having to work with too many employees. Also, the system allows captains to be reviewed year over year to see who is succeeding (mentors for others) and see who could use assistance/replacement.

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

- Exceeded our highest ever corporate employee campaign total with @ \$202,953 pledged
- Record number of campaign participants @ 2315
- Participation rate increased from 46.1% to 47.9%

**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**

The core purpose of the FirstHealth organization is “to care for people”. FirstHealth employees and this organization believes that caring for people extends far beyond the walls of traditional hospital settings, and they generously give their time to hundreds of civic, church, school and community projects. Nearly 3,600 employee hours were contributed toward implementation of FirstHealth community benefit activities in 2015 as part of a community benefit contribution of nearly \$3.3 million. As an organization, FirstHealth of the Carolinas provided community benefit in the amount of over \$45 million including charity care (2016 figures are not complete at this time).

FirstHealth of the Carolinas supports employee participation to volunteer time in the community. The purpose is to encourage and reward employees who volunteer their personal time to participate in projects and initiatives consistent with FirstHealth’s community benefit philosophy. Eligible employees who participate in an approved community benefit effort receive one hour of paid-time-off (PTO) for every two hours of work on the project or initiative. The maximum per calendar year incentive for an employee is 20 PTO hours, unless the project or initiative has been approved for additional incentive by the CEO. During 2016, 20 employees received incentive PTO valued at almost \$6,710 (actual cost) for 624 hours of volunteer “work.”

At Moore Regional Hospital, a food drive was held to collect for the Moore County Backpack Pals program. Employees donated 3,210 pounds of individually packaged food items and more than \$3,000 in money or gift cards for a total equivalent of 8,364 meals. The Backpack Pals program provides food items to children who do not have enough to eat over weekends and other extended periods when school is not in session. Throughout the school year, FirstHealth employees make weekly deliveries of between 90 and 100 backpacks to the Robbins, NC area.

**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**

FirstHealth of the Carolinas, a not-for-profit health system, was created out of a philanthropic drive in the community to bring better health care to the region in 1929. In turn, the organization has been deeply rooted in the community to provide not only charity care in terms of treatment, but also needed philanthropic support as necessary. This philanthropic relationship is highlighted by its relationship with the United Way. The United Way campaign is the only corporate-wide campaign supported by the organization. FirstHealth of the Carolinas makes up approximately 25-30% of the annual county campaign for the United Way of Moore County, which is where the corporate office is located. Funding from the campaign also goes to support local charities in the counties where FirstHealth has hospitals including Richmond County (United Way of Richmond County), Hoke County (Hoke United Fund), and Montgomery County (Montgomery Crisis Fund) and other counties where employees reside. Employees are not limited to donating to counties where the health system has a hospital.

To promote ongoing support for community involvement and volunteerism, FirstHealth matches each two hours of volunteer time for an approved activity with one hour of paid-time-off (PTO). This program is referenced in Standard 1. When new employees are hired, they are required to attend a two-day corporate orientation, during orientation a speaker from the FirstHealth Community Health Services conducts a presentation including information about FirstHealth’s community benefit program and the PTO Match incentive that FirstHealth provides to employees who volunteer their time and work in the community. Additionally, the employees learn of the FirstHealth commitment to the community in the areas of health and wellness and commitment to the United Way. The session ends with a video that was filmed in the community highlighting FirstHealth employees and their work in the community. This video can be accessed at <https://www.firsthealth.org/about>.

Finally, there is corporate representation on the United Way of Moore County Board of Directors to ensure a year-round relationship and support of philanthropic activities in the community.

**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.

Though community benefit has been part of our organization since its doors opened in 1929, the CEO of FirstHealth worked with FirstHealth Community Health Services in 2001 to establish a formalized community benefit program to define and coordinate existing services and develop new services for the communities, which the institutions of FirstHealth serve. In addition to the continuation of traditional benefits such as provision of essential hospital services at no cost to the low-income patient, a comprehensive community benefit program also responds to community needs, as well as represents good business practice. Participation in the United Way Campaign is a critical piece of the puzzle that the organization can foster the spirit of giving throughout the organization. In fact, FirstHealth of the Carolinas is one of two organizations in the county that serve as a corporate sponsor of the United Way of Moore County.

Additional corporate leadership activities included:

- Intranet FirstHealth United Way webpage including a “message from the CEO” video;
- FirstHealth’s CEO appropriated a \$10,000 budget to campaign expenses;
- For the United Way of Moore County Board, the Administrative Director of Community Health Services serves as Treasurer for the Board. Additionally, he serves on the Review/Allocation Committee of the United Way of Moore County;
- The FirstHealth’s United Way Campaign Chairperson serves on the Review and Allocations Committee for the United Way of Moore County; and
- Corporate officers lead the way through participation in various United Way activities and promotion through departments and where appropriate participate in other United Way efforts in FirstHealth covered counties where there is a United Way agency, specifically Richmond County.

**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	2315	40	1.7%	-3.2%	0
2015	2170	47	2.2%		

UW % of Leadership Givers - 2016 # of leadership givers divided by the 2016 total # of givers

UW Leadership Givers % Change - 2016 # of leadership givers minus the 2015 # of leadership givers divided by 2015 #

**Outline any factors or information that could affect % of leadership givers.**

**Standard 4 - Corporate or Foundation Contributions and Non-traditional/In-kind Support**

- State where management places the United Way Campaign within its prioritization of activities.
- List specific sponsorships, resources, materials, loaned executives, advertisements, videos (YouTube as an example).
- List specific “social media” activities/events/activities.

**Up to 5 points. If your organization is Federal or Nonprofit and cannot legally provide a Corporate Gift, please provide information on in-kind gifts and other efforts below.**

1. Corporate management is included in every aspect of the campaign from the campaign chair through the departmental supervisor level. In addition, the organization allotted work time for more than 150 individuals to plan, organize and conduct the campaign, provided supplies and materials to publicize and promote the campaign, provided Public Relations department professional assistance and provided the financial resources for the campaign and the prizes awarded. Management held departmental meetings educating employees of the importance of the campaign contributions and many spoke one-on-one with employees to gain commitment.
2. The FirstHealth Administration allocated a \$10,000 budget to the corporate UW campaign committee to use for various supplies, events, marketing and prizes.
3. The FirstHealth organization supports the Moore County UW through a corporate sponsorship gift each year (\$5,000 in 2016). The majority goes to support the 2-1-1 referral service. In addition, the total gift of this year’s FirstHealth employee campaign is 25-30% of the total campaign goal for the Moore County United Way. The Richmond County employee campaign contributed approximately 20% of the Richmond UW goal. Because the system has employees who live in multiple counties, employees are provided the option to direct their donation to the United Way of their choosing. Funds were donated to agencies in nearly 15 counties.
4. The annual UW campaign is the only financial assistance solicitation FirstHealth endorses for its entire employee workforce other than those for the Foundation of FirstHealth. The importance of giving back to the community is stressed through FirstHealth’s commitment to community service and in its recognition of employee efforts as a part of the corporate performance evaluation program.
5. FirstHealth sponsors and employees participate in American Red Cross blood drives at all three hospitals and the Health & Fitness center, pregnancy fairs, community celebrations, community health fairs, educational programs, employee fitness days at local businesses, National Cancer Survivors day event, NICU reunion, and many other events associated with United Way or its partner agencies.
6. Through a partnership with Montgomery County Schools, FirstHealth operates two school-based health centers advocating health and wellness for all students in the school system. FirstHealth’s three Dental Care Centers provide dental care to Medicaid-eligible children in Moore, Hoke and Montgomery counties. Children assisted by these programs are part of the population assisted by United Way.
7. FirstHealth provides a speakers bureau to provide no cost educational programs to various community, church and civic groups, which include United Way agencies.

Year	Corporate Gift	Percent Change
2016	\$5,000	-60%
2015	\$12,514	

**Local corporate numbers are reported below unless indicated as  statewide**

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

Campaign kick-off events were held at each of the four FirstHealth hospitals for the departmental team captains to pick up pledge cards for their departments, receive education about the United Way and the campaign logistics. Departmental captains were also informed that they had the freedom to design department-specific events, contests, raffles or fun-filled activities to enhance the overall corporate campaign. Using departmental captains is very important since the organization covers such a large geographic territory. Additionally a corporate campaign database allows our departmental captains electronic pledge card entry in a seamless manner without losing the high-touch benefit of handing out a physical pledge card to each employee. This system also provides clear goals for each of the captains, by automatically calculating their total pledges versus their individual goal. Their goals this year were to meet/exceed their group's participation goal (55%) or to increase overall donations in their areas of responsibility by 2%. Captains are incentivized with corporate raffle tickets for prizes specific to the captains. Departments responded with breakfasts, lunches or snack breaks as they distributed pledge cards and informed staff of the campaign. Others held meetings for managers to stress importance of giving in the community. FirstHealth makes it easy for employees to donate to the United Way campaign by allowing donations of PTO, cash or payroll deduction. Employees can designate to the county program of their choice or to specific non-profit agencies and, for many employees, being educated about this option made the choice to give simple. Additionally, the campaign is promoted year-round to new employees during orientation to either prepare them for the upcoming campaign.

An Intranet FirstHealth United Way webpage (see below) keeps the entire organization updated on information about the supported agencies, campaign progress, corporate campaign contest winners tied to campaign activities, and our CEO message. All prize winners were published on the organization's electronic bulletin board on our United Way web page and in the employee newsletter. Additional recognition of donors and prize winners and race toward the goal at each of the hospitals was promoted through a specially-developed web page for the corporation's intranet. This page was kept up to date with total donations and percent toward goal as well as ongoing prize and competition winners. Electronic notices were sent out as the web page was updated. This year's theme was "Wild, Wild West", which was incorporated into all events and communications throughout the campaign. Western events included horseshoes, calf roping, and a can toss and a Jail and Bail.

The screenshot shows a web browser window displaying the FirstHealth United Way intranet. The page features a header with the FirstHealth and United Way logos, a date range of Oct 28 - Nov 16, 2016, and a "Captain's Admin" link. The main content area is titled "FirstHealth United Way/Montgomery Crisis Fund Campaign" and includes a video player for David Kilarski, CEO, and a "Photo Contest" section. A prominent "News" section titled "United Way Winners - NEW NUMBERS DRAWN 11-28-2016" lists prize winners for an off-site location drawing and prize wheel raffles. On the right side, a progress bar chart shows goals for Montgomery, Moore, Richmond, and Hoke counties, along with a total goal of \$202,400. A table below the chart displays current totals for each category and the overall total.

Montgomery Goal	Moore Goal	Richmond Goal	Hoke Goal	Total Goal
\$8,000	\$170,000	\$14,400	\$10,000	\$202,400
Total	Total	Total	Total	Total
\$5,815.32	\$170,684.35	\$16,951.20	\$9,502.00	\$202,952.87

## 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

First Health employees continue to respond to donate for the support of local needs. One of the goals of the Campaign Committee was to increase per capita giving among FirstHealth employees. Enthusiasm generated during the campaign by the prizes, the education on the partner agencies, and communication about the progress toward the goal is a key to success. The use of 150 departmental captains across the organization helps to infuse enthusiasm by generating one-on-one contact and pushing to meet campaign deadlines.

The 2016 campaign reached an all-time high! It is a significant accomplishment and also provides an opportunity to look for new ways to see how the organization can find a new plateau.

**Please note below that the employee number listed below is the total number of “employees” and not “full-time employees.”**

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	\$202,953	1.4%	2.5	4831	\$42.01	-1.1%	0
2015	\$200,000			4706	\$42.49		

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

FirstHealth asks that each captain collect all pledge cards regardless of whether the employee contributes to the campaign or not. That way the campaign committee can verify that everyone at least received their card and the communication associated with the distribution of the cards. Each year a presentation is made to the corporate leadership team of the hospital asking them to select a dynamic and well-respected employee from each of department (larger departments may have more than one) to be their team captain. Once captain selections have been verified, the campaign committee holds a kick off meeting with those captains to share presentations from the local agency representatives, review prior year successes/lessons learned, and to review goals for the current year.

### 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	4831	2.6%	2315	6.6%	2.5	47.9%	2.5
2015	4706		2170			46.1%	

*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**