

2016 Spirit of North Carolina Campaigning for Excellence



United Way
of North Carolina

Application Form			
Organization Name	Ingersoll Rand		
Street Address 800-E Beatty Street	City/State Davidson, NC	Zip 28036	
Name of Person Completing Application	Keri Taylor	Phone 704-664-2284	E-mail ktaylor@uwcentralcarolinas.org
Name of Sponsoring United Way	United Way of 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

Organization Employee Size <i>Check the appropriate box for this application submission.</i>	Type of Organization <i>Check the appropriate box for this application submission.</i>
<input type="checkbox"/> Up to 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 checked="" type="checkbox"/> 1501-2500 employees <input type="checkbox"/> 2501-5000 employees <input type="checkbox"/> 5001+ employees	<input type="checkbox"/> Financial/Banking Institutions <input checked="" type="checkbox"/> Manufacturing <input type="checkbox"/> Business Campaign <input type="checkbox"/> City/ County Municipality <input type="checkbox"/> Higher Education <input type="checkbox"/> School Campaigns <input type="checkbox"/> Hospital/ Health System <input type="checkbox"/> Retail <input type="checkbox"/> Not-for-Profit Agency - 501(C)3 <input type="checkbox"/> Professional Services <i>(small business, partnerships, LLC accounting, architect, engineering firm, attorneys, etc.)</i>

To certify the contents of this application, the signature of the nominating United Way CEO or his/her direct designee must be obtained. An email from the United Way may accompany the application submission stating that it has been reviewed and approved if electronic signature is not available.

United Way CEO/Designee Name:

Shannon Young

Printed Name

Signature

syoung@uwcentralcarolinas.org

Email

Organizational Overview

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

Describe the philanthropic culture of the organization:

Ingersoll Rand's vision is to create a world of sustainable progress and enduring results. As a company we focus on advancing the quality of life by creating comfortable, sustainable and efficient environments. Our Ingersoll Rand employees share an extraordinary passion for creating a comfortable and sustainable environment--especially for those individuals in need.

Ingersoll Rand's community relations purpose is to address social and environment imperatives that deliver employee and customer loyalty and benefit the communities around the world where we have business operations. The efforts are directly tied to our organization's philanthropic principles of achieving impact, advancing business-community synergy, community responsiveness, employee preference, globalization and diversity, and inspiring progress and sustainability.

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.

Nothing bring a community together like a fun and competitive golf tournament! Ingersoll Rand recruits a committee of employees that work tirelessly all year to execute one of the most successful fundraisers for United Way of Central Carolinas. They invited fellow community members to participate in the annual golf tournament on a warm August day in at Trump National in Mooresville, North Carolina. Ingersoll Rand leaders, employees, business partners, friends and family raised more than \$325,000 at this one event.

List 3 bullet-points highlighting numeric campaign success:

- The Ingersoll Rand United Way campaign had a 26 % increase for a total raised of \$1,542,183!!!
- The employees stepped up and 73% of the donors increased their gift from last year. (31% of those donors were new givers)
- The corporate gift matches employee giving and special events. Due to the smashing success of the campaign the corporate gift increased by 22% to total \$776,335.

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

Ingersoll Rand's commitment to the community is deeply ingrained in its culture. Ingersoll Rand's largest volunteer efforts are channeled through United Way of Central Carolinas. This commitment and emphasis on United Way of Central Carolinas allows Ingersoll Rand to focus deeply on the health and human service needs which makes a greater impact on the community rather than diluting the impact over numerous causes and drives. When IR commits to a volunteer project, they are "all in" and do everything with 100% dedication and enthusiasm. While many companies are often rewarded for being involved in "everything," we think that it is more valuable to have volunteers deeply engaged in specific issues to make real change for our community.

During the month of October, Ingersoll Rand employees participated in over 45 service projects with 580 volunteers donating their time, talent, and treasure to a wide variety of community activities. That is about 25% of the employee base that just participated in the season of caring activities. We cannot account for the many other volunteer activities that employees participate in throughout the year.

In 2016, United Way of Central Carolinas was able to distribute \$32,000 to partner agencies through the Ingersoll Rand's Dollars for Doers' program. Dollars for Doers enables employees to individually donate 20 hours of volunteer time per year to their non-profit organization of choice and the Ingersoll Rand Foundation matches their commitment with a donation. Employee volunteers are given 20 paid hours per year to volunteer in their community. When they complete 20 hours \$250 will be given to their charity of choice. When they volunteer for a United Way agency, they are given twice the normal amount, \$500 for their United Way agency.

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

The United Way campaign committee at Ingersoll Rand is committed to raising money for the United Way and our partner agencies in addition to the extensive volunteer work. They work perilously to be creative in their fundraising and to engage all departments and their employees in their mission. It takes a lot of participation for a company to raise \$1.5 million! Ingersoll Rand does not limit their engagement to the annual United Way campaign. They are engaged in activities year round. Below are some examples of their volunteer commitment in 2016:

- More than 45 Day of Caring projects were completed in October including building a wheel chair ramp for a person with a disability, serving meals at a shelter, and assembling furniture for those moving from homelessness to housing.
- American Heart Walk: raises funds to save lives from this country's No. 1 and No. 5 killers - heart disease and stroke. Designed to promote physical activity and heart-healthy living, the Heart Walk creates an environment that's fun and rewarding for the entire family. Each year hundreds of Ingersoll Rand employees and families participate in this event.
- Year round volunteer fundraising activities that include, but were not limited to: leader vs. employee corn hole tournaments, the trick or trot fun run at Halloween, ride and drive events, a November “No Shave Month” competition and a highly competitive golf outing.

Ingersoll Rand’s work with the United Way includes inviting our fellow community members to participate in an annual golf tournament held at Trump National in Mooresville, North Carolina. Ingersoll Rand leaders, employees, business partners, friends and family raised more than \$300,000. Ingersoll Rand also hosts an annual poker run in November for community partners to participate in as well. This ride is held in partnership with Tilley Harley Davidson and includes riders from all different parts of the state. Our goal in hosting these events is to create community awareness around the tremendous work United Way does as highlight partner agencies in the area.

Our employees also showed off their creativity throughout the year with several events, such as:

- A fashion boutique where new or gently used clothing and accessories were donated by employees for other employees to purchase and/or bid on popular items. This event raised \$4,467.
- The United Way Test Drive Event with Modern Nissan. Overall, we raised \$10,000 for the United Way (pre-match). We had a total of 250 individuals participate by taking a test drive around campus earning \$40 per drive for United Way
- United Way online auction held in September.
- Dodge ball and Hockey game events to raise employee engagement and donations for our campaign.
- Community partnerships including: Our Towns Habitat for Humanity, The Ada Jenkins Center, Mooresville/Lake Norman Christian Mission, Barium Springs Home for Children
- Charlotte Trane group partnerships including: Classroom Central-school supplies, Men’s shelter-clothing, Loaves and Fishes-canned goods, Red Cross—thank you cards for troops, Salvation Army Xmas Bureau-toys

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

Ingersoll Rand’s CEO, Enterprise Leadership Team and managers hosted and advocated for wide participation in activities that enabled our company to achieve our \$1.5 million donation. Activities included, but were not limited to: donating auction items (e.g., leader-led boat cruises, home cooked dinner parties, golf outings, career coaching sessions), leader vs. employee dodge ball tournaments, ride and drive events, a motorcycle poker run, leader vs. employee kickball tournaments, and a highly competitive golf outing. Equally important, it has given Ingersoll Rand employees an opportunity to meet and spend time with leaders that are not in their direct chain of command.

This top-down philanthropic strategy positioned Ingersoll Rand to help nearly 300,000 families and individuals in the Charlotte region, including Anson, Cabarrus, Mecklenburg, Lake Norman and Union communities. Specific examples include:

- **Mike Lamach** is Chairman and CEO of Ingersoll Rand. Each year the campaign kicks off with an email from Mike to each employee encouraging them to support their local United Way of Central Carolinas financially and through personal participation in a variety of United Way sponsored volunteer activities. Additionally, Mike is a loyal Alexis de Tocqueville Society member.
- **Scott Krull** is the Vice President of Global Commercial Leader at Ingersoll Rand and the Executive Chair of the 2016 United Way campaign at the company. Scott also serves on the United Way of Central Carolinas Board of Directors.
- **Jonathon Weichers** is the Vice President of Sales and Commercial Leader at Ingersoll Rand. He serves on the United Way Campaign Cabinet and the Community Board of Directors in Mooresville/Lake Norman.
- **Janet Pfeffer** is a retired executive from Ingersoll Rand. serves on the United Way of Central Carolinas board and lead the effort to reach out to other Ingersoll Rand retirees to participate in the campaign.

This high level of participation exhibits to the employees the importance of community involvement and service.

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	380	85	23%	3%	
2015	381	83	22%		

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.

Coming into the campaign we knew that there were 10 leadership donors that were no longer part of the company campaign. However, with the personal asks from leadership Ingersoll Rand was able to secure 17 new leadership donors for the 2016 campaign.

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.

Ingersoll Rand focuses on addressing social and environmental imperatives that deliver employee and customer loyalty and benefit the communities around the world. As part of this commitment, all Ingersoll Rand locations worldwide have the opportunity to set up a United Way annual employee giving campaign. All money donated by employees to the United Way during the campaign is matched dollar-for-dollar by the Ingersoll Rand Foundation.

The Ingersoll Rand Foundation matches all employee and special event contributions dollar-for-dollar. Throughout the campaign employees were apprised of our progress toward the goal through strategic communications clarifying the impact of how the contributions will help under-privileged children and families in the community. Throughout the year, employees from other U.S. offices – including Southern Pines, North Carolina and Bryan, Ohio – regularly came to events and made donations, highlighting the team spirit shared across Ingersoll Rand!

Ingersoll Rand frequently donates space at their campus learning center for UWCC and other nonprofit uses.

More importantly, Ingersoll Rand gladly stepped up to help pilot a new United Way initiative in our region called Tutor Charlotte. They will engage employees to become readers, tutors, and/or mentors in our community and “testing” the infrastructure of the program before United Way rolls it out to the entire community. This commitment demonstrates that they value the strong partnership with United Way to fulfill their philanthropic goals in our region.

Local corporate numbers are reported below unless indicated as statewide

Year	Corporate Gift	Percent Change
2016	\$776,336	+22%
2015	\$635,900	

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

Our campaign coordinator and Executive Sponsor worked diligently to create success through developing a unique approach to achieve the goal and bring the United Way team closer together. Throughout the campaign, they continually focused on leveraging our company's core values to achieve unprecedented levels of employee participation and commitment.

They worked to bring the United Way team together through meaningful, shared experiences. One tactic used to build the team was the intentional inclusion of all Ingersoll Rand Strategic Business Units (SBUs) represented in the Charlotte area, including the Charlotte Trane (a brand of Ingersoll Rand) Remanufacturing Facility and other Charlotte locations in every event.

They educated participants on the United Way mission, encouraged donations to come from the heart and convinced donors their money serves those most in need in the local community. Some volunteers were reluctant to join the team year-after-year, to combat this the team strived (a) to create an open and communicative team environment and (b) to make events rewarding and memorable to encourage ownership of the target and continued participation.

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

As part of our winning culture, Ingersoll Rand is committed to giving back to those communities that host our products and services. As part of this, the United Way leadership team developed a stretch goal of \$1.5 million targeted to serve the community and build a greater sense of teamwork through shared experiences.

The United Way leadership team sought to increase the number of donors that participate, but also the amount they give. Through training and education as well as leadership-driven activities to engage employees we increased the donation amount by 10%.

The key to success was through educating engaged employees that every dollar makes a difference and can provide the following:

- \$5 can provide 20 books for preschoolers
- \$20 can provide financial coaching for a family
- \$100 can provide 2 weeks of afterschool care for a 3rd grader
- \$250 can provide needed prescriptions for our neighbors without health insurance

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	\$ 288,447	+10%		2294	\$ 125.76	+5%	
2015	\$ 264,355			2207	\$ 119.78		

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

Ingersoll Rand focuses on addressing social and environmental imperatives that deliver employee and customer loyalty and benefit the communities around the world. As part of this commitment, all Ingersoll Rand locations worldwide have the opportunity to set up a United Way annual employee giving campaign. All money donated by employees to the United Way during the campaign is matched dollar-for-dollar by the Ingersoll Rand Foundation.

Ingersoll Rand also offers employees the Dollars for Doers program. Under this program, if an employee volunteers at least 20 hours of time with the United Way, the Ingersoll Rand Foundation will provide a \$500 grant to the United Way. Also under this program, if a team volunteers at least 50 hours of time with the United Way, the Ingersoll Rand Foundation will provide a \$1,000 grant to the United Way.

New employees are educated on each of these programs during onboarding. Current employees are reminded annually and encouraged to participate in charitable giving.

Ingersoll Rand has many event and fundraising opportunities throughout the year that allow employees to participate and donate outside of the fall employee pledge drive. **Employees that contribute to these events are not reflected in the numbers below.**

In the 2016 campaign, 279 of the donors increased their gift. Of the 279 increased donors 43% (119) of the them were new donors this 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	2294	+4%	380	-1%		17%	
2015	2207		381			17%	

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