

2016 Spirit of North Carolina Campaigning for Excellence



United Way
of North Carolina

Application Form			
Organization Name	Iredell Health System		
Street Address 557 Brookdale Dr.	City/State Statesville, NC	Zip 28677	
Name of Person Completing Application	Thomas Sherrod	Phone 704-873-5661	E-mail Thomas.Sherrod@iredellhealth.org
Name of Sponsoring United Way	United Way of Iredell 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

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 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:

Brett Eckerman

Printed Name



Signature

beckerman@unitedwayofiredell.org

Email

Organizational Overview

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

Describe the philanthropic culture of the organization:

Iredell Health System has a long history of philanthropy to the community. As a County owned hospital system Iredell has a vision beyond the walls of the medical facility. Iredell was instrumental in creating a Mental and Medical Facility for the disadvantaged in Iredell County. Iredell also initiated providing a Dental Clinic for the low income areas of the county. Additionally, the hospital has worked hard to offer free or reduced fees for those that qualify for Mammograms at our Mammography Center.

Along with improving the health of our community, Iredell offers scholarships to students at our local Community College, Mitchell Community College. The hospital helps Nursing students and pre-Nursing students to obtain their education. Iredell sees its role in the community as one of supporting and promoting organizations and efforts that improve the lives of our citizens. The hospital helps sponsor fund raising and awareness events for Iredell County Hospice, The Martin Luther King Day breakfast, The CareNet Counseling Center and many other worthy events.

Iredell's mission is to be a community leader as a servant organization to the community. We will elaborate later about the hospital's commitment to the community through its long standing leadership role with United Way. The hospital not only provides Board members to help guide our local United Way but has been the number one financial contributor for many years.

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.

This year Iredell took the initiative to be the first Company to create, implement and launch their United Way campaign, hoping to be inspire and model what is involved in offering a successful campaign to its employees and the larger community. The United Way planning committee decided to highlight our Dietary Department for its amazing dedication to encouraging every member of the Department to contribute to the financial campaign. Large posters were placed throughout the hospital and on pledge boxes distributed to each Department with the slogan "BE LIKE DIETARY". A picture of the Dietary personnel and an explanation of how 98% of the Department donated to United Way in 2015 was the focus of the poster. For one of the lowest paid Departments to lead the hospital in contributions served to encourage other Departments to increase their participation.

Incentive items such as Panther tickets, water bottles, and for every fair-share giver a YETI – type 30 oz. tumblers helped give a tangible thank you to our employees who contributed and greatly increasing our participation. We have already seen our local school system and others start to implement some of the ideas we generated out of this years' experience, magnifying the impact to outside of our facilities.

List 3 bullet-points highlighting numeric campaign success:

- The total contributions increased from \$76,000 to over \$108,000, a \$32,000 or 43% increase
- Fair Share contributions increased from 56 to 148, a 164% improvement
- Total number of employees donating jumped by 164 participants, almost a 28% spike

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 Board of Directors and President of Iredell Health System have always taken a leadership role in promoting community collaboration to address the healthcare needs of our area. IHS has a vision of providing healthcare beyond the walls of our hospital facility and clinics. We see our mission as making life better for the entire community and work to promote community collaboration in accomplishing this goal. A goal we share with our local United Way. A few examples of our approach beyond our United Way campaign include:

- IHS works in partnership with the Iredell County Health Department, United Way and several other community partners to develop and prioritize a community wide health plan every three years. This plan uncovers areas of need in healthcare related services and serves as a blueprint to drive collaborative action to address pressing needs.

This process was integral in bringing a Federally Qualified Health Center to our community several years ago. IHS was a leading financial sponsor (along with United Way) of this effort and has provided ongoing support over the years as this group became established.

This process also led to the establishment of Get Fit Iredell (a United Way sponsored Impact Initiative designed to increase physical activity levels for families across our community). The hospital was a founding partner with this initiative and has provided both financial and leadership support to this collaborative effort.

- The Health System has partnered diligently with Fifth Street Ministries, one of our United Way agencies, to provide affordable and/or free dental and healthcare to homeless and low income individuals in Iredell County. Staff members volunteer to provide medical care, wellness education and life skills training for the residents of the shelter. One of our anesthesiologists befriended one of the young residents of the shelter during a volunteer painting project and after several years of friendship even adopted this young man.
- The health system also provides reduced and/or free mammography to qualified families through a community Mammography Fund. Over 200 women were helped through this fund over the last several years. The funds that support this effort are all raised locally through staff driven events and community outreach.
- Our hospital staff participate in Relay for Life through a series of bake sales, a 5k race and other events.
- IHS also has provided over \$33,000 in corporate sponsorships and donations to over 30 local non-profits serving health needs in our community over the last year.

This vision and focus on our community pays dividends for our employees. They feel connected to the larger community and invested in the health and welfare of all our citizens. When our employees are active in the community, they have more meaningful suggestions as to how IHS can further improve the life of our community. All our management team are strongly encouraged to serve on an agency Board of Directors. This hands-on involvement enables managers to better promote both the United Way campaign and also encourages other employees to consider giving back as volunteers to agencies across our community.

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

Iredell Health System has an excellent long-standing relationship with United Way of Iredell County. The hospital has been the primary donor to United Way for over a decade. The hospital has contributed to United Way not only financially but by encouraging Management level employees to serve on its Board of Directors. At present, the hospital has one Management and one senior level Management employee on the Board. Along with helping direct United Way’s mission, hospital staff are actively involved in the allocations process that reaps benefits when staff ask questions about how United Way agencies impact the community.

In past years the hospital has created its own video with statements from employees and agency representatives. We have made part of the United Way video a dance celebration featuring various Departments and all three shifts. We have been successful to the point that at this time of the year, immediately following our campaign, staff will stop me in the hall and suggest songs for our next video. It is exciting to see the personal ownership of employees for the success of our United Way campaign.

We have invested in creating this atmosphere of celebration for what United Way does by having a Hospital Picnic outside in the hospital parking lot with live music, great food and even the personal favorite of employees, Dip and Dots. As mentioned earlier, staff begin suggesting items for the menu and Bands, DJs and games for next year’s celebration.

We always schedule agency speakers for Departmental staff meetings. We also had some employees whose families had personally benefited from United Way willing to share their stories at staff meetings.

This year we put special emphasis to the theme, “Be Like Dietary” for our campaign. We had pictures of Dietary employees along with quotes on posters throughout the hospital and on pledge boxes in every Department. We decided to highlight our Dietary Department as they have been the leader in employee participation for larger Departments, having 98% of employees donate in spite of their being one of our lower paid employee groups. Other Departments saw what Dietary has been contributing and decided to increase their efforts, as well.

Our campaign also added the “Candy Cart” that was loaded with assorted candies and taken to each Department on all three shifts as a new method of promoting United Way. This promotion was a huge hit among employees. Along with the candy, we distributed educational information about United Way’s involvement in our community. We also had agency representatives available for questions. This idea will definitely be repeated in 2017!

After the campaign period, we are active in the allocations process and promote United Way in our employee newsletter year round. Along with the outward promotion, the committee is meeting to plan Team Leader trainings, themes, incentive items, posters, speakers and other ways to keep United Way’s work before the employees. We don’t want United Way to just be an activity that happens once a year but a continual effort throughout the year, so that when the actual campaign is initiated, employees are excited to participate and are educated about where their money is impacting 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

When our present CEO, Ed Rush, arrived 10 years ago, he made it clear that one of his priorities was community involvement and specifically he expected a high profile United Way campaign. He and the entire Administrative Team has been extremely supportive of any suggestions and creative ideas that promote awareness of the mission and impact of our United Way agencies.

It has been wonderful to work with an Administration that allocates the necessary financial resources to educate employees about United Way’s involvement in the community and provide incentives to employees that contribute. Shortly after Mr. Rush arrived, we instituted a United Way picnic in the parking lot, with tents, special treats (Dip and Dots), free meals for each shift and United Way representatives available to talk with employees about their unique contribution to the betterment of our community. We used the picnic as a Kickoff event for United Way that created enthusiasm and education for the campaign.

This year we calculated the expense of the picnic, food, entertainment and tents. We took a leap of faith and decided to use the financial resources previously allocated for the Kickoff event and provided quality incentive items for various levels of participation. Our YETI-like 30 oz. tumbler with the hospital logo was the biggest hit, helping us increase Fair Share donors by an astounding 164%. We were so shocked by the amazing response that we had to approach Administration three times for approval to reorder. Administration was as enthusiastic as the United Way committee about the overwhelming response. Members of the committee were invited to the Hospital Board meeting to celebrate the success of the campaign and generosity of the employees.

Administration members also helped set the tone for the campaign by offering an incentive of their own. The Administrative team offered to wash the car of one employee if IHS topped \$90,000 in their campaign; and to cut the grass of another employee if it reached \$100,000.

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	751	25	3%	19%	5
2015	587	21	3%		

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.

While giving level was not the focus of our campaign efforts. Our focus on participation rates did lead to a net gain of 4 new leadership donors during the 2016 campaign. We are especially pleased to see this increase because we had anticipated a potential decrease in leadership giving due to several regular leadership donors who have recently retired.

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.

Our annual Hospital Trustees meeting will be this month, where close to eighty prominent members of the community are invited to attend. To give an idea of how high Iredell Health System places our United Way campaign in its priorities, I was recently shown a list of the three achievements that will be highlighted in 2016. Our employee United Way campaign will be one of the three achievements celebrated with our trustees. Not only the hospital, but our trustees place a high priority on our community owned hospital’s contribution to our community through its support of our local United Way. Our United Way campaign will be part of the written materials handed out to each trustee and a featured part of the power point presentation.

The resources that Iredell Health System allocates to our United Way campaign are extensive. Just to cover the enormous increase in incentive items in 2016, the hospital had to expend over \$12,000. In addition to the incentive items, two free meals for all three shifts were estimated to cost between \$10,000 and \$12,000. Along with the free meals, we offered a free meal voucher to various levels of donating that cost approximately \$2,000.

However, the largest financial commitment is measured by the number of employee hours allocated to planning, speaking, promoting, decorating, poster design and production and other activities proudly supported by Administration. To accurately estimate the cost to the hospital of employee hours expended for the United Way campaign would be almost impossible. Just my hours for the three months that the campaign is at its height would cost the hospital close to \$18,000. And, our committee consists of ten active members that took part in various parts of the campaign. A conservative estimate of Administration’s annual financial commitment to United Way would eclipse \$70,000. Admittedly, this year’s campaign challenged not only the committee but Administration’s commitment. But, our Administration that has had to be extremely frugal over the past few years to meet increased budget demands, enthusiastically supported the Committee’s request.

As part of Management’s involvement in promoting United Way, our Marketing Department was instrumental and extremely creative in promoting our achievements on the hospital Facebook page and Twitter accounts. Press releases were sent to various media outlets and published in Statesville and Mooresville newspapers. In previous years, we have placed our internal video on YouTube and had over 1,500 views.

We also provide a corporate sponsorship for the Get Fit Iredell program that is \$1,500 per year.

Local corporate numbers are reported below unless indicated as statewide

Year	Corporate Gift	Percent Change
2016	\$1,500	0%
2015	\$1,500	

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

The United Way campaign committee was expanded in 2016 to include Marketing and our Director of Patient Experience. Both were a wealth of productive ideas and energy for the campaign. The theme for the year was entitled, “Be Like Dietary”. Since our Dietary Department had 98% of their employees donate in 2015, we decided to highlight their commitment and enthusiasm to motivate other Departments. We had posters with the theme and a picture of some of the Dietary staff placed throughout the hospital and on our pledge boxes that are given to each Department to help collect pledge forms. We also had pictures of the incentive items offered to employees for the various levels of contributions.

The committee worked hard to decide what incentive items would motivate staff to contribute. It was decided to offer YETI-like 30 oz. tumblers with the hospital logo for the Fair Share donors, along with a free meal voucher, a hospital logo pen and a chance to win a pair of Panther tickets and a weekend at Oak Island. We also offered a nice hydration bottle with the hospital logo to employees donating \$5.00 a week, along with the free meal voucher and the hospital logo pen. And, for employees donating \$1.00 a week, we decided to offer a hospital logo pen.

Committee members personally delivered the incentives to most employees and took that opportunity to thank each donor for their generous gift. For a few departments it was better logistically to allow the department manager to deliver the incentives and that also provided an opportunity to appreciate those who participated.

It was amazing to see how the simple gesture of offering employees a “thank you” gift motivated employees to contribute. Our Fair Share donors increase from 56 to 148, a 168% increase. We had to reorder the tumblers three times to meet the demand. We simply could not believe the response!! Of course, with the increase in donors that jumped by 164 donors, a 28% increase, our total contribution to United Way soared by 43%. We were able to go from 76,000 in 2015 to over \$108,000 this year!! Needless to say, we were ecstatic!! The generosity of our employees overwhelmed even our most enthusiastic projections.

We also provided a hospital-wide free meal as a campaign “Kickoff” event and because we did so well, we offered a second free meal for the shocking response. Along with the free meals, we had agency speakers attend as many Departmental staff meetings as possible during the months of August and September. Brian Duncan from our local I-Care agency was a huge hit among the Departments. We had Brian attend our Management Team meeting and our Nursing Management meetings. In addition, we had our local United Way campaign Chairperson speak to our Administrative Leadership Team.

Another idea that helps employees donate is that we place a personalized label from the hospital on each pledge form. On the pledge forms we included descriptions of the incentive items and employee statements from our Dietary personnel as to why they contributed to United Way. Mrs. Virginia McClelland, a 50 year employee, was quoted as saying, “I give because it helps other people and I have been helped so much, I want to return the favor to someone else.” All these efforts combined to create an atmosphere of generosity to others!!

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

We had a four pronged approach to our United Way campaign. We wanted to make United Way relevant to the everyday employee. We wanted our staff to feel and know the joy of making a difference in our community. We decided to have one of our least paid Departments be a focus of our campaign. Our Dietary Department has a phenomenal participation every year. In 2015, 98% of the Food Service Department contributed to United Way. Of our larger Departments, Food Service consistently leads the way. Our employees know that Dietary always is one of our most successful Departments as far as percent of participation. But, our staff did not know why.

We adopted the slogan of “Be Like Dietary” for our campaign theme. We picked several key contributors and had them pose for a picture and give short but meaningful statements as to why they faithfully give to United Way supported agencies. This was effective for two reasons. First, other better paid Departments saw that Dietary was out performing them in their impact on our community. And, our Administration makes it clear that making an impact on our community is a high priority! Other employees also read why the Dietary staff give through United Way by reading their very personalized testimonies. Employees saw that United Way agencies had helped many of our own employees. One of our Dietary employees said, “I give to Hospice because they helped me with my husband before he passed. It’s a great place”.

We also make a concerted effort in conjunction with our Local United Way to secure effective and personal speakers to drive home the life changing effect of their donations. Brain Duncan, Patti West and many other speakers made a direct connection between a donation and the effect on a person’s life. We had speakers come to the Administrative Team, The Management Team, The Nursing Management Team and almost every Department in our hospital, some of which have meetings for all three shifts. It was a tremendous undertaking but it paid high dividends.

By sharing more personal stories of impact, we were able to not inspire more individuals to participate in the campaign, but we inspired donors to dig deeper and make a larger contribution to the effort.

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	\$105,100	+46%	2.5	1328	\$79.14	+43%	2.5
2015	\$71,839			1302	\$55.17		

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

Iredell Health System is diligent in making sure every employee at least turns in a pledge form. We ask employees to return a signed pledge form (personalized with their name and id #), so that we know every employee has had the opportunity to hear the message of United Way and make an informed decision.

Our United Way Committee also contacts every Department Manager and schedules a speaker to present the United Way message at every staff meeting during the campaign, even when some of the Nursing Departments have three to five meetings. Some years members of our committee have arranged a speaker or given the appeal themselves to over sixty staff meetings. These staff meetings are great opportunity to answer questions, dispel any false information or rumors and to personalize where their money is making an impact in our local community.

This year we increased our efforts making sure the Administrative Team, The Nursing Management Team and the Departmental Management Team heard from agency speakers. Additionally, our committee made sure the speakers talked in specifics about lives that had been affected and changed by donations. Also, during our free meal celebrations, we had agency representatives available to answer questions and highlight their agency's involvement in the community.

Furthermore, this year we were sure to include the United Way message in our hospital's orientation process. We informed new hires of our hospital's long standing generosity to United Way and our status as our community's largest contributor. Pledge forms were also given to new employees as a part of orientation.

Additionally, our committee made sure every employee that donated was handed their incentive item/s personally and were thanked for their participation. I cannot convey how much it meant to employees to have someone give them a nice token of appreciation for their donation. The committee believed it was important to spend the monies allocated by Administration for the campaign in a manner that revealed to employees our appreciation for their contribution. The committee decided to significantly increase the quality of our incentive items and have the items delivered personally to contributors.

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	1328	1%	751	27%	2.5	56%	2.5
2015	1302		587			45%	

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**