

2015 Spirit of North Carolina Campaigning for Excellence

Application Form <i>(www.unitedwaync.org)</i>			
Company/Organization Name	Lincoln Financial Group		
Address	100 N Greene St	City/State Greensboro North Carolina	Zip 27401
Name of Person Completing this Application	Daniel Hastings	Phone (336) 691-3238	E-mail Daniel.hastings@lfg.com
Name of Sponsoring United Way	United Way of Greater Greensboro		Metro Size 1A
United Way Contact for Questions	Scott Leighty	Phone (336) 378-5027	E-mail Scott.Leighty@unitedwaygso.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 and 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!</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

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 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 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:

Tamarind N. Stewart

Email:

Tamarind.stewart@unitedwaygso.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:

For more than 100 years, Lincoln Financial Group and its affiliated companies have recognized that good corporate citizenship is intrinsic to our success.

Throughout the year, our more than 8,000 employees are transforming the lives of others through both financial contributions and volunteer efforts. Whether partnering with a few colleagues to help clean a local park or personally investing in our own neighborhoods, these efforts do not go unnoticed. Every autumn, this generosity becomes especially evident during our annual United Way campaign.

Our company's spirit of philanthropy led to the establishment of the Lincoln Financial Foundation in 1962, and it has inspired a rich tradition of giving ever since.

Today, Lincoln Financial is committed to making charitable contributions in the communities where we maintain a strong business presence. Through the Lincoln Foundation and our corporate giving, we annually donate approximately \$10 million to grantees in our communities.

We have helped transform lives through these annual grants by making the following impact:

- 2.8 million youths served by education programs
- 2.4 million individuals fed and sheltered
- 3.2 million opportunities for access to the arts and arts education
- 3 million job training opportunities

We firmly believe that strong economies begin with strong communities, which is why we focus our philanthropic efforts in four strategic areas:

Spirit of Philanthropy

1. Youth Education
2. Human Services
3. Economic/Workforce Development
4. The Arts

Our deep connection to our communities is further reflected in how we select our grantees. By establishing local Charitable Contribution Committees in our primary business locations, we empower our employees to review grant proposals, make site visits and award grants to the nonprofit organizations that they believe will make an enduring impact on their communities.

At Lincoln, we are proud to help enhance the quality of life in our local communities. Good corporate citizenship is a principle upon which our company was built, and each of us has an opportunity to carry on that tradition.

Organizational Overview (continued)

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

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)

Our theme this year was “Give Hope, Give Now”. We wanted to personalize the campaign by highlighting the experiences of Lincoln employees through a video presentation titled “Faces of Hope” and in-person testimonials. We also made it personal by reaching out to and engaging new employees, millennials, and affinity groups within Lincoln.

Employees were encouraged to come forward and give testimonials in our all-employee meetings. Two of these testimonials were recorded on video and played during each of our five all-employee meetings. One of these testimonials was from Michael Sileno, who is active with Big Brothers Big Sisters of the Central Piedmont. Michael talked about being paired with an 11-year-old boy named Trimill. While Michael talked about his relationship with Trimill and how both he and Trimill benefited from the program, photographs and video clips were displayed of the two of them, showing Trimill growing up to be a happy and responsible young man.

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.)

- Increased the amount raised through special events and activities by 11% over the previous year. (Increased from \$20,708 to \$23,043)
- Number of employees giving increased by 6.4% (from 784 to 834)
- Greensboro employee participation rate of 53%

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

Lincoln Financial employees play a significant role in our locations by working side-by-side with our nonprofit partners as volunteers or board members. We encourage and support employees who give of their time and money to local organizations through the Lincoln Foundation's Matching Gift and LIVE (Lincoln Invests in Volunteer Experiences) programs.

LIVE (Lincoln Invests in Volunteer Experiences) Program

Our LIVE Program recognizes the investment employees contribute to nonprofit organizations in their communities and gives full-time employees the opportunity to direct funds to those organizations for which they volunteer. For every 50 hours of volunteer service to a nonprofit, Lincoln contributes \$500 on behalf of the employee.

In our key employee locations, an Employee Activities Committee (EAC) organizes volunteer activities ranging from clean-up days in parks and schools, to food and clothing drives, to mentoring, and to building/repairing homes.

Our business units encourage their teams to participate in community activities.

Lincoln Financial won the 2015 N.C. Governor's Award for Corporate Volunteerism for their commitment to volunteerism and our community. A few highlights include:

- Days of Caring
 - Boys and Girls Club
 - Wiley Elementary School/Communities in Schools
 - ARC of Greensboro
 - Women's Resource Center
 - Black Child Development Institute
- MLK Community Day of Service
- African-American Leadership Group (sponsored Dream the American Dream event with GCS students at the Civil Rights Museum)
- Women's Leadership Group sponsored financial literacy programs for children and adults through Junior Achievement and the Women's Resource Center.
- Lincoln employees serve on the boards of 15 local United Way agencies
- More than 150 members of the Lincoln Financial family volunteered for the National Folk Festival
- The IT department hosted a high school/college level "hackathon" in which more than 30 Lincoln employees committed their week-end to coaching and mentoring
- Lincoln employees contributed more than 550 hours of service during CHS's annual Paint the Town event in 2015

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

Information is disseminated through various means.

We initially kicked off our 2015 United Way campaign at our annual employee picnic, where we also hosted a United Way agency fair. Approximately 754 Lincoln employees visited the six agency booths. Additionally, we had attendance and support from the United Way CEO, other United Way leaders and Lincoln Financial leaders.

Throughout the campaign, we provided a weekly email update on activities to all N.C.-based employees. A campaign planning committee, with representation from each major business unit, served as advocates for the campaign.

We hosted meetings with our affinity groups and our Cornerstone Leadership givers.

Finally, we hosted our traditional all-employee meetings. At each meeting, we had various United Way speakers, along with representation from Lincoln Financial's senior leadership team.

- Employees Activities Committee picnic
- United Way Agency Fair hosted at the annual company picnic
- Cornerstone Level Giving Breakfast with UW leadership and Agency speakers
- New Employee Meetings with UW reps and Agency speakers
- All Employee Meetings with UW reps and Agency speakers
- African-American Leadership Group meeting with UW leadership and Agency speakers
- Women's Leadership Group with UW leadership and Agency Speakers
- Days of Caring
 - Boys and Girls Club
 - Wiley Elementary School/Communities in Schools
 - ARC of Greensboro
 - Women's Resource Center
 - Black Child Development Institute

Standard 3 - CEO/Senior Leadership and General Leadership Involvement & 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 Cornerstone gift.

Lincoln’s CEO, Dennis Glass, sent an email to all Lincoln employees announcing the beginning of the United Way campaign. His message talked about the importance of United Way, as it continues to strengthen and empower our communities and address some of the problems that concern us most. He also stated how proud he was of the overwhelming support and countless hours of volunteerism given to last year’s campaign.

Members of Lincoln’s Corporate Leadership Group located in Greensboro volunteered to speak at each of the employee meetings for the campaign:

- Cornerstone breakfast
- New employee meeting
- All-employee meetings

100% of Lincoln’s Corporate Leadership Group located in Greensboro contributed to United Way at the \$1,000 level or higher. Many of them serve on the boards of various United Way agencies as well as other community-oriented nonprofit organizations.

100% participation by Lincoln’s Greensboro onsite leadership team representing senior leaders of all business units and shared services located in Greensboro.

Local corporate numbers are reported below unless indicated as statewide

Year	Total Number of Givers	Number of Leadership Givers	% of Leadership Givers	Percent Change
2015	765	96	100 %	0 %
2014	728	90	100 %	0 %
2013	764	84		

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. If your organization is Federal or Nonprofit and cannot legally provide a Corporate Gift, you will automatically be awarded 5 points.

Corporate overview: Lincoln develops a corporate-wide campaign theme; “Give Hope, Give Now” was this year’s theme, and we had a campaign logo, incentive trips, prizes, paid time off incentive for .5% and 1% donors, and dedicated weekly communications to all employees.

In conjunction with our main site leadership committee, a chair and co-chair are appointed to lead the local site campaign. They are also given a budget for their annual planning. Employee involvement is critical, and our employees are eager to participate and assist in every aspect of the campaign. A planning committee comprised of employees from each major business unit steers the campaign, giving their time, their experience and their ideas.

As part of our corporate culture, getting involved is not only encouraged, but rewarded. United Way Days of Caring is a great example of this. More than 125 employees participated – but the best part is that when we asked for volunteers, we had more than we needed within 48 hours!

Our biggest and most fun event involving employees is our employee-produced United Way “Faces of Hope” video, an annual employee favorite.

The Lincoln Financial Foundation makes an annual contribution of \$250,000 to the UW of Greater Greensboro.

Lincoln Financial also supports numerous UW events during the year including the African America Speaker Series, Women in Philanthropy and the Young Leaders Trunk or Treat event.

Our Campaign Co-Chair, Hugh Holston also chairs the United Way African American Leadership Group, giving of his time and leadership abilities.

Local corporate numbers are reported below unless indicated as statewide

Year	Corporate Gift	Percent Change
2015	\$255,250	0%
2014	\$255,250	0%
2013	\$257,750	0%

Percentage change example: 2015 minus 2014 divided by 2014.

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

The campaign was coordinated by a campaign chair, co-chair, and a campaign committee. The committee consisted of past chairs and co-chairs, representatives of various leadership groups, and various other employees with valuable talents and skills in communications, videography, and leadership. This group guided all campaign activities, secured funding, and recruited volunteers and internal campaign ambassadors as needed. The chair and co-chair gave speeches and presentations at employee meetings and events and scheduled additional speakers from Lincoln's Corporate Leadership Group and from United Way.

Campaign activities included:

- The Spare Change Challenge was a new activity this year, conceived and implemented by two of Lincoln's young leaders who engaged our 50 ambassadors to raise more than \$2,900 through various friendly competitions and contests.
- Pop-up Raffles of donated Taylor Swift concert tickets, an Apple Watch, and an autographed basketball raised close to \$1,500.
- Lincoln's African-American Leadership Group sponsored the sale of tickets allowing employees to wear jeans to work on certain days. This activity raised close to \$9,000.
- Lincoln's Women's Leadership Group sponsored a raffle of 17 prize baskets assembled by volunteers from donated gifts and prizes. This activity raised \$7,665.
- The campaign co-chair sponsored, planned, and coordinated a golf tournament that raised close to \$2,000.

Campaign Decisions:

- The campaign committee collectively made decisions about the activities and goals related to the campaign, focusing on employee participation that would drive meaningful donations.

Campaign Events:

- Cornerstone Breakfast: Honored those who donated \$1,000 or more in the previous year
- Days of Caring: Lincoln employees volunteered for various activities designed to help the following agencies:
 - Boys and Girls Club
 - Wiley Elementary School/Communities in Schools
 - ARC of Greensboro
 - Women's Resource Center
 - Black Child Development Institute
- Leadership Meeting: The campaign chair and co-chair shared campaign plans and goals with officer-level leaders and requested their support.
- New Employee Meeting: A Lincoln senior vice president discussed Lincoln's view toward community involvement in general and United Way in particular. This meeting resulted in 52 new pledges being received that same week from new employees who had never pledged before.
- Employee Picnic: Featured six United Way agencies as well as speeches from the chair and from a United Way representative
- Lincoln's African-American Leadership and Women's Leadership Groups sponsored a luncheon: Open to all employees and featured speakers from United Way
- All-Employee Meetings: Featured speeches from Lincoln senior leadership, United Way representatives, employee testimonials, and even a skit highlighting the important work being done by two United Way agencies: Hospice and Palliative Care of Greensboro and Reading Connections

Incentives and Employee Recognition:

- Dozens of incentive prizes donated by local businesses and Lincoln's business partners
- Additional paid time off granted
 - 0.5% of salary = ½ day
 - 1% of salary = 1 day

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*

We wanted to personalize the campaign by highlighting the experiences of Lincoln employees through a video presentation titled "Faces of Hope" and in-person testimonials. We also made it personal by reaching out to and engaging new employees, millennials, and affinity groups within Lincoln.

A Lincoln senior vice president discussed Lincoln's view toward community involvement in general and United Way in particular. This meeting resulted in 52 new pledges being received that same week from new employees who had never pledged before.

We conducted a series of All-Employee Meetings which generated considerable enthusiasm among our employees. These meetings featured speeches from Lincoln senior leadership, United Way representatives, employee testimonials, and even a skit highlighting the important work being done by two United Way agencies: Hospice and Palliative Care of Greensboro and Reading Connections.

This year we placed a greater emphasis on volunteerism which resulted in more "buzz" about the campaign and more donations being raised via our special events.

Local corporate numbers are reported below unless indicated as statewide

Year	Total Employee Giving Amount	Percent Change	Total No. of Full-time Employees	Employee Per Capita	Percent Change
2015	\$338782.61	-3.1%	1580	\$214.42	-10.3 %
2014	\$349681.45	3.81%	1463	\$239.02	-6.8 %
2013	\$348096.35	-----	1357	\$256.52	-----

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***

- Repeated announcements are sent out and posted regarding Days of Caring events and information about volunteering. This year, the agencies were:
 - Boys and Girls Club
 - Wiley Elementary School/Communities in Schools
 - ARC of Greensboro
 - Women’s Resource Center
 - Black Child Development Institute
- We recruited 50 ambassadors to act as campaign representatives and coordinators for every floor of every Lincoln building in Greensboro. These ambassadors relayed ongoing information about the campaign to the employees in their respective areas, and they also answered and/or relayed questions from employees to the campaign committee. They also helped to drive campaign activities in their areas, such as the Spare Change Challenge.
- A leadership meeting was held, where leaders are asked to encourage their employees to support United Way through volunteerism, advocacy, and giving.
- We held a new-employee meeting with a focus on community involvement in general and United Way in particular.
- Our all-employee picnic featured six United Way agencies and speeches from the campaign chair and a United Way representative.
- An African-American/Women’s Leadership Group luncheon featured speakers from United Way.
- All-employee meetings featured messages from Lincoln employees and United Way representatives.
- United Way information was shared with all new employees during the onboarding process.
- We held a new hire meeting at the beginning of the annual campaign.
- A mailing was sent out to retirees discussing the theme of this year’s campaign and asking for their support.

Local corporate numbers are reported below unless indicated as statewide

Year	Total Number of Employees	Percent Change	Total Number of Givers	Percent Change	Percent Participation
2015	1580	8%	834	6.4%	52.8%
2014	1463	8%	784	11.8%	53.6%
2013	1357	-----	889	-----	65.5%

Employee % change - 2015 number of employees minus 2014 number of employees divided by 2014 number

Givers % Change – 2015 number of givers minus 2014 number of givers divided by the 2014 number