



United Way of North Carolina

### 2018 Spirit of North Carolina Application

Organization Name			
Street Address		City/St:	Zip
United Way Name			
Application Contact	Name:	Email:	

Organization – Employee Size <i>Check the appropriate box</i>	Type of Organization <i>Check the appropriate box</i>
<input type="checkbox"/> Up to 25 employees	<input type="checkbox"/> Financial/Banking Institutions
<input type="checkbox"/> 26-50 employees	<input type="checkbox"/> Manufacturing
<input type="checkbox"/> 51-100 employees	<input type="checkbox"/> Business Campaign
<input type="checkbox"/> 101-200 employees	<input type="checkbox"/> City/ County Municipality
<input type="checkbox"/> 201-500 employees	<input type="checkbox"/> Higher Education
<input type="checkbox"/> 501-1000 employees	<input type="checkbox"/> Hospital/ Health System
<input type="checkbox"/> 1001-1500 employees	<input type="checkbox"/> Retail
<input type="checkbox"/> 1501-2500 employees	<input type="checkbox"/> Not-for-Profit Agency - 501(C)3
<input type="checkbox"/> 2501-5000 employees	<input type="checkbox"/> Professional Services <i>(small business, partnerships, LLC accounting, architect, engineering firm, attorneys, etc.)</i>
<input type="checkbox"/> 5001+ employees	

### Standards of Excellence Checklist

<input type="checkbox"/>	1.	Community engagement and volunteer culture – <b>OUTSIDE OF UW RELATIONSHIP</b> <i>Up to 5 Points</i>
<input type="checkbox"/>	2.	Partnership <b>WITH UW</b> to raise community awareness of needs & foster a spirit of giving <i>Up to 5 Points</i>
<input type="checkbox"/>	3.	CEO, Senior, and General Leadership Involvement and Giving <i>Up to 10 Points</i>
<input type="checkbox"/>	4.	Corporate or Foundation Contributions & Other Non-traditional and In-kind Gifts <i>Up to 5 Points</i>
<input type="checkbox"/>	5.	Employee Campaign Coordination, Recognition and Incentive <i>Up to 5 Points</i>
<input type="checkbox"/>	6.	Participation Level <i>Up to 10 Points</i>
<input type="checkbox"/>	7.	Special Events <i>Up to 10 Points</i>

Signature of the nominating United Way CPO or his/her designee:

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

**Organization Overview**  
**Summary for use during Awards Ceremony**

Briefly describe the philanthropic culture of the organization.

Share ONE creative strategy, engagement opportunity, volunteer activity OR special event that ignited campaign success

Three NUMERICAL successes you wish to highlight:

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- 
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**Standard 1 – Community engagement and volunteer culture within the community footprint. Exclude UW partnership and focus on other organizations that the company works with to build a stronger community.**

**Up to 5 points**

**For example:**

- Describe how the organization works in tandem with community stakeholders to problem solve and create solutions that build stronger communities.
- Does the organization have a social responsibility policy or statement? If so, provide some highlights of the mission.
- Is the organization seen as a community philanthropic leader and why?
- How does the organization benefit from being involved in serving the community?
- Are there specific ways the organization builds a volunteer culture?
- What % of employees are engaged in volunteer work in the community?

**Standard 2 – Organization’s partnership *WITH UNITED WAY* to raise community awareness of needs and foster a spirit of giving. Up to 5 points**

- How does this organization’s philanthropic priorities align with the local United Way mission or initiative work? Where is synergy created because of United Way partnership?
- What innovative process, product, or programs were used to elevate community engagement and increase volunteer or giving action?
- Comment on year-round engagement that exists, if applicable.

**Standard 3 - CEO/Sr. Leadership & General Leadership Involvement & Giving**

**Total Possible Points = 10**

**Up to 5 points for description and specific event details**

**Up to 5 points for increase in leadership giving or consistent/stable giving by leadership**

- Define leadership giving – company and/or united way criteria
- Describe role that senior leadership plays in “influencing” philanthropy, community support, & campaign activities
- List any specific events **that are directed by the leadership team**

**Up to 5 points:**

**Complete the chart below. Up to 5 points**

*2.5 points awarded for **any** positive % change in number of leadership givers*

*Additional 2.5 points awarded for 10% or greater increase in number of leadership givers*

***Judge’s discretion** - Points awarded for consistent leadership giving for companies less than 100 employees- 2.5 points*

Year	Total # of Givers	# of Leadership Givers	% Change in # of Leadership Givers	Pts Awarded for positive % change	Pts Awarded – 10% increase or greater	Pts Awarded – Judge’s Discretion	Total Points
2018							
2017							

**% of Leadership Givers = 2018 # of leadership givers divided by 2018 total # of givers = % of Leadership Givers**

**Does the % increase from 2017 to 2018? If so, award 2.5 points – if greater than 10% award additional 2.5 points**

**Provide comments re: small companies (less than 100 employees) who have no change in Leadership Givers:**

**Standard 4 – Corporate or Foundation Contributions and Non-traditional/In-kind Support    Up to 5 Points**

- List specific sponsorships, resources, materials, loaned executives, advertisements, videos, etc. that support the United Way campaign.

*Nonprofits and Federal organizations who cannot participate in corporate giving will be judged separately and the point value of this standard removed from the total possible earned points. Consideration will be given to small organizations whose employees participate but due to size are unable to also provide a corporate gift.*

Year	Corporate Gift
2018	\$

**Standard 5 – Employee campaign coordination, recognition, and incentive**

**Up to 5 points**

- Describe the work of the campaign coordinator and/or committee, **listing successful planning tools, specific activities, and strategies** 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
- Share any “social media” communication that propelled momentum and increased participation

**Standard 6 – Participation Level**

**Total Possible Points for Standard 6 = 10**

**Up to 5 points for description**

**5 points awarded for growth in number of givers**

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, etc.

**Up to 5 points**

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

**5 Points Awarded for increase in % participation**

**% Participation** = # of givers divided by # of employees

**Change in % Participation** - 2018 % participation minus 2017 % participation

Year	Total # of Givers	Total # of Employees	% Participation	Change in % Participation	5 pts awarded for increase in % participation
2018	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2017	<input type="text"/>	<input type="text"/>	<input type="text"/>		



**Standard 7 - Special Event**

**Up to 10 Points**

- Successful special events are often the catalysts that educate and energize campaigns. Share creative event details on **ONE outstanding special event** used to motivate/excite/reach employees and community.
- How did the event attract or impact potential and ongoing donors/volunteers?
- Describe event/impact results (quantitative and qualitative, if possible)

