

# 2016 Spirit of North Carolina Campaigning for Excellence



United Way  
of North Carolina

Application Form			
Organization Name	Publix Supermarket Store #1475		
Street Address 34 Miller Street	City/State Winston-Salem, NC	Zip 27104	
Name of Person Completing Application	Ryland Tisdale	Phone 336-721-9370	E-mail Ryland.Tisdale@uwforyth.org
Name of Sponsoring United Way	United Way of Forsyth 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 checked="" 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 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 type="checkbox"/> Hospital/ Health System <input checked="" 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:**

**Ryland Tisdale**

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

\_\_\_\_\_  
*Signature*

*Ryland.Tisdale@uwforyth.org*

\_\_\_\_\_  
*Email*

## **Organizational Overview**

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

### Describe the philanthropic culture of the organization:

The fifth tenet of the Publix mission statement is the following: **Involved as responsible citizens in our communities.** This is reflected in the value system of their founder, George Jenkins and his Spirit of Giving.

#### **The Spirit of Giving**

Once asked what he would be worth today if he hadn't given so much away, Publix founder George Jenkins, affectionately known as "Mr. George", immediately responded "Probably nothing." Publix gives to thousands of local non-profit organizations, tailoring giving to the needs of each local community. They put the weight of the company behind these campaigns. If you shop at Publix, there's a good chance you support them, too.

Take a look at what we've accomplished together.

#### **Corporate Campaigns**

Feeding America  
Food for Sharing  
Food For All  
Children's Miracle Network  
March of Dimes  
Special Olympics  
Tools for Schools  
United Way

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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.

When the store held their grand opening in May of 2016, Kim Reynolds, Manager of Media and Public Relations, stressed how Publix was dedicated to the communities it serves. "We have a focus on youth, education, and helping the hungry and homeless" said Reynolds. "To commemorate our grand opening, Publix made a donation of \$5,000 to local schools,"

Second Harvest Food Bank Executive Director Clyde Fitzgerald said, "Publix as a corporation is a great partner with Feeding America Food Banks in all of the cities where they operate stores. We've long been waiting for Publix to come to Winston-Salem and we are overjoyed that day is now here."

Over a ten day period, September 1<sup>st</sup> through September 10<sup>th</sup>, Publix held seventeen employee meetings. All meetings were mandatory and each meeting was attended by one of our partner agencies as well as a representative from United Way. Before each meeting, the United Way Champion for Publix showed a company video highlighting the long and proud history of how Publix has been a partner with United Way and the communities they serve since their founding in 1930.

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

- Over 95% of their associates contributed to the campaign.
- Publix raised almost \$57,000 in their campaign. This is an incredible achievement for a single store and a testament to their commitment to United Way and their community mission.
- They had eight leadership donors and a per capita giving rate of almost \$380.

**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 following are examples of how the associates at Publix become “**Involved as responsible citizens in the communities where they live.**”

**Publix Serves Day 2016**

On April 27 more than 4,500 Publix associates volunteered their time and talents to assist 130 nonprofit organizations whose mission is focused on food insecurity and/or homelessness. Associates across our six-state operating area rolled up their sleeves and built homes for Habitat for Humanity affiliates, sorted food at local food banks and pantries, prepared and served meals at shelters or completed beautification projects (pressure washing, painting, planting) as part of our company’s annual day of service.

Making the day even more special, retiring CEO, Ed Crenshaw, took to road on his last office day to visit with Publix associates and thank them for their efforts. Crenshaw visited projects in Anderson, South Carolina; Atlanta, Georgia; Jacksonville, Florida; and Ft. Lauderdale, Florida. Crenshaw’s grandfather, George W. Jenkins, late founder of Publix Super Markets in 1930, established a culture of giving back. To the communities we serve. Mr. George, as he was affectionately called, believed that giving back was an investment in our communities, a responsibility and a privilege. 86 years later, his culture of giving back is alive and well within the organization.

Publix Serves Day 2016 marks the second annual companywide event. While Publix associates give back individually throughout the year, associates look forward to helping their communities and team building with fellow associates within their respective districts. In addition to Publix volunteers, each organization received approximately \$1,000 to assist in their service day efforts and beyond.

**Publix Charities**

Publix Charities is committed to meeting the basic needs of the communities it serves through additional financial support for housing. The foundation also supports other important causes, such as food assistance, education, and youth programs. Here is the most recent example of how they are serving their communities.

Publix Charities began its support of Habitat for Humanity in 1989 with its first contribution to Habitat for Humanity of East Polk County (Winter Haven, FL). The foundation has continued its support, contributing a total of \$4 million to more than 80 affiliates in 2015. Now, Publix Charities is pleased to make 2016 the year of its largest gift to Habitat for Humanity affiliates yet. Publix Charities is donating \$5.5 million to provide support for over 120 Habitat for Humanity affiliates, and to fund 61 new homes in our communities. Publix Super Markets will help make each house a home by greeting the new homeowners with fully stocked pantries.

## **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**

Each year, Publix associates pledge to United Way, largely through payroll deductions. In 2015 Publix associates pledged \$33.4 million. Combined with a \$25.3 million match from Publix Super Markets Charities, the total for 2015 is \$58.7 million.

Although United Way is a national organization, the money raised locally stays in our communities. By working closely with a vast network of volunteers, local United Ways are able to raise funds to meet the needs of their neighbors.

Publix is consistently one of the top donors to United Way in the U.S., and we couldn’t do it without the generous associates that you, our customers, see every day. It’s no surprise that the caring individuals who personally walk you to a product you’re seeking or cheerfully greet you in the checkout line are the same individuals who make our United Way donation campaign such a success.

Publix would like to extend special recognition to our associates who volunteer with agencies supported by United Way. Not only do they donate funds, they also donate their time and talents in order to improve lives in their communities.

Before the grand opening of their first store here in Forsyth County, representatives of United Way along with local dignitaries and community leaders were invited for a “sneak preview” of its new store concept. Executives with Publix were very enthusiastic about their support for United Way and made a commitment to run a campaign in the fall. Through their employee meetings, we were able to reach over 150 employees.

Below are two areas of need that Publix has helped address in our local community:

- **Feeding America**

Publix has donated more than 220 million pounds of perishable food to the Feeding America network. In a related effort, Publix Super Markets Charities announced a \$5 million donation to the Feeding America network in August of 2016. This is more than three times the amount they have previously given in any year.

- **Tools for Back to School**

Every year, Tools for Back to School gives more students a chance to excel in their studies. Too often, parents don't have the money to prepare their children with basic learning materials like pens, markers, crayons, or notebooks. Many times, teachers use their own money to provide these resources.

Your contributions to Tools for Back to School go to local charities and participating schools.

Together, we're strengthening our educational system by providing these essential tools for learning: crayons, pencils, notebooks, washable markers, colored pencils, filler paper, pens, folders, scissors, and glue.

Donate \$5 or more to Tools for Back to School and you'll receive a free reusable bag. Simply bring a bag and donation form to checkout.

### 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

At Publix, Executive Leadership takes a very active role in influencing philanthropy, community support and campaign involvement. You need look no further than the retiring CEO, Ed Crenshaw and his involvement with **The Publix Serves Day** this year. He took to road on his last office day to visit with Publix associates and thank them for their efforts. He traveled hundreds of miles to visit projects in Anderson, South Carolina; Atlanta, Georgia; Jacksonville, Florida; and Ft. Lauderdale, Florida; continuing the legacy of his grandfather, George W. Jenkins, the late founder of Publix Super Market in 1930. He believed that giving back was an investment in our communities, a responsibility and a privilege. 86 years later, his culture of giving back is alive and well within the organization. Below are but a few of the recognition awards Publix has received for its support of United Way:

- **Honored as a United Way Outstanding Strategic Partner (2014)**
- **Received United Way Summit Awards for Philanthropic Engagement and Community Impact (2012)**
- **Presented the United Way National Spirit of America Award (1996)**

#### 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	142	8	6%	100%	5
2015	N/A	N/A	N/A		

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.

This is a new account. It is also a single store. Therefore we have no previous comparison to work with.

#### 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.**

#### Corporate Campaigns

- **Feeding America:** A link to their website is listed on the Publix Community page
- **Food for Sharing:** Donation cards representing three levels of giving are made available at the checkout.
- **Food For All:** Customers and associates can purchase donation cards in \$1, \$3, or \$5 amounts.
- **Children's Miracle Network:** During our 25-year partnership with Children's Miracle Network Hospitals, Publix customers and associates have raised more than \$32 million for 25 **designated** hospitals throughout the Southeast
- **March of Dimes:** In 2016 the Publix campaign raised more than \$7.1 million for this amazing organization, earning us the prestigious honor as their number one fundraising team in the country.
- **Special Olympics:** In January 2016, our customers and associates contributed more than \$4.8 million to Special Olympics to ensure athletes were able to train and compete free of cost.
- **Tools for Schools:** Donate \$5 or more to Tools for Back to School and you'll receive a free reusable bag. Simply bring a bag and donation form to checkout.
- **United Way:** In 2015 Publix associates pledged \$33.4 million. Combined with a \$25.3 million match from Publix Super Markets Charities, the total for 2015 is \$58.7 million.

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

Year	Corporate Gift	Percent Change
2016	\$24,369	100%
2015	\$N/A	

*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 Store Manager and Customer Service Manager were in charge of overseeing the campaign. They organized 17 employee meetings for their associates over a ten day period. The Publix United Way video was shown at each meeting. Also, a representative from a United Way partner agency spoke at each meeting along with the United Way representative. Attendance was mandatory and food and refreshments were provided. The store goal was \$25,000. They exceeded that goal by 125%. To put this campaign together in three months while still in the stages of a new store opening was truly remarkable.
- Gift cards and in store recognition via internal communication were part of the incentives to increase participation.
- The powerful message of Publix and their history of giving back and investing in the people and communities they serve was presented most effectively by store management. Also, during the grand opening tour, Publix provided \$5,000 to the local schools which served as a pre-kickoff to their campaign. This was followed by remarks from their Regional Manager and Marketing Director reinforcing their commitment to the community and its residents.

### 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**

The primary reason for the outstanding success of this campaign and the incredible level of per capita employee giving is simply the Publix commitment to the communities they serve and their customers. Publix has a long standing tradition of being the kind of company a community can count on beginning with their founding in 1930. During the campaign meetings for their associates, giving back to the community as well as giving back to each other was pointed out eloquently and passionately by store management, tenured Publix employees who were present and had participated in several past campaigns as well as personal testimonials from associates whose lives and families had been positively impacted by United Way and their partner agencies.

**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	\$56,892	100%	2.5	150	\$379.28	100%	5
2015	\$N/A			N/A	\$N/A		

*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

All Publix associates are notified of the upcoming campaign through internal store communication. Those associates who have participated in previous campaigns and are familiar with the philanthropic culture of Publix help get the word out as to the importance of the campaign, its benefit to the community and how participation is something each store uses to compare itself to other Publix locations. All associates were required to attend one of the employee meetings. Giving is certainly not mandatory but is encouraged. Pledge forms were distributed at each meeting and associates were asked to complete them and turn them in at that time.

All new hires and associates are informed of the Publix commitment to philanthropy and are encouraged to take an active role in their community through volunteering or participating in company events that benefit that community.

### 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	150	100%	142	100%	2.5	95%	2.5
2015	N/A		N/A			N/A%	

*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**