

2016 Spirit of North Carolina Campaigning for Excellence



United Way
of North Carolina

Application Form			
Organization Name	Smith Leonard PLLC		
Street Address 4035 Premier Drive, Suite 300	City/State High Point	Zip 27265	
Name of Person Completing Application	Kelly York	Phone 336.821.1427	E-mail kyork@smith-leonard.com
Name of Sponsoring United Way	United Way of Greater High Point		

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 checked="" 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 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 type="checkbox"/> Retail <input type="checkbox"/> Not-for-Profit Agency - 501(C)3 <input checked="" 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:

Bobby Smith

Printed Name

Signature

Bobby.smith@unitedwayhp.org

Email

Organizational Overview

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

Describe the philanthropic culture of the organization:

Smith Leonard is a CPA firm that believes our core competency lies in the way we take care of our employees and our community. By creating a unique culture and work environment, we believe our engaged, happy employees will be empowered to go out to our clients and the community and give their best every day. We stand behind and live out our core values of ARE – Access, Relationships, and Experience. We ARE accessible. We ARE relational. We ARE experienced. We ARE Smith Leonard. These core values certainly apply both internally and externally, as well as to our service in the community.

We support and encourage employee involvement in the community, both from a financial standpoint as well as through physical participation. Our team members feel empowered to go out and serve the causes that are near to their heart. Our office closes for an annual “day of service” where we deployed our 50 team members this year to 6 various causes, including painting a Boys & Girls Club, packing backpacks for our local food-insecure children, and volunteering at 2 local animal shelters. Many of our team members volunteer regularly, but most also serve in leadership positions through various board memberships.

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.

Our 2016 theme was carnival-based with the tagline “Come one – give all!” As part of our “greatest campaign on earth,” we hosted a kick-off day that included fair food (fried oreos, corn dogs, etc.) and provided a dunking booth to allow our employees to dunk our 11 partners. Each partner had to be “bought in” with a \$100 donation from the group. At that point, balls were then sold on the day of to raise additional funds. As a result of this, everyone in our firm participated and gathered together to raise funds for United Way. It was great team building. Additionally, during our kickoff meeting, several of our employees shared personal testimonials of why they give to United Way. Folks talked about disabled siblings, siblings born prematurely, hospice care for parents with cancer, etc. as reasons why they give to United Way and ways United Way organizations have personally impacted their families.

List 3 bullet-points highlighting numeric campaign success:

- Leadership giving in 2016 increased to 12 people from 8 in 2015, and with dollars increasing significantly from \$22,455 to \$34,818.00.
- Our total campaign giving increased in 2016 to \$47,919.48 from \$33,512.40 in 2015.
- We raised \$1,300 via our employee fundraisers, which was in addition to the standard pledges. This money came from nominating partners to be in a dunking booth and paying subsequently per ball to dunk them on our kick-off day.

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

We are fortunate to work for a company that encourages community service and leads with a “tone at the top.” Both Darlene Leonard and Ken Smith, our current and former managing partner, respectively, have a tremendous résumé of community involvement. Along with many other community positions, Darlene was Board Chair of the United Way of Greater High Point in 2015, along with a concurrent role as Chair of the High Point Chamber of Commerce. Ken is currently 2016 United Way Campaign Chair for the United Way of Greater High Point and also has leadership positions in a variety of other organizations throughout High Point. Smith Leonard is not an organization that merely writes a check to get involved. If we are sponsoring an organization in any way, you will likely find that our team members are personally involved in attending events and taking on a leadership role. Our philanthropy and community service is varied, both in type and geography. We serve where we live and are proud to give back to the communities around the Piedmont Triad. Our core values are “Access, Relationships, and Experience – We ARE Smith Leonard.” We expect our employees to embody these values in the community to be accessible to those in need, build relationships with those around them, and leverage their experience to help others, thereby creating a positive experience for themselves.”

Volunteer organizations include: United Way of Greater High Point, High Point Chamber of Commerce, High Point Economic Development Corporation, Greensboro Chamber of Commerce, Guilford Merchants Association, Business High Point, Rotary Clubs, Kiwanis Clubs, National Conference for Community and Justice, Big Brothers Big Sisters of the Central Piedmont, Out of the Garden Project, Local YMCAs, Backpack Beginnings, Youth Focus, High Point Fire Department Relief Fund, High Point Regional Health Systems, High Point University, High Point Boys and Girls Club, Alcohol and Drug Services, Davidson County Economic Development Commission, Davidson Community College Foundation, Inc., Davidson Progress, various religious organizations, Triad Outreach Partners, GOFAR, various booster clubs and school involvement, Guilford County Economic Development Corporation, Junior League

Sampling of specific activities in 2016 beyond board membership:

- Hosted a loaned executive lunch from the United Way recipient organizations in advance of our campaign to increase awareness
- Packing food backpacks for food insecure children
- Planted trees at a local elementary school
- Planting a garden, cleaning the facility, and packing food at Out of the Garden Project
- Volunteering at local animal shelters
- Reading at schools and tutoring local children
- Sponsoring a local family at Christmas, which provided Christmas to 3 children in our area
- Serving meals at church
- Coaching local youth sports
- Fundraisers (Kiwanis Chicken Feed, Rotary Skeet Shoot, Rotary Raffle/Silent Auctions)
- Annual CANpaign food drive

Our estimated number of annual volunteer hours across the organization:

# of Employees	Annual Volunteer Hours	Dollar Value
50	1800	\$40,590

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

We have a community involvement committee, which meets quarterly to determine various initiatives for our group to get involved corporately, beyond each of our individual volunteerism. Additionally, we have a sub-group of employees called SLA (Smith Leonard Ambassadors), which is comprised of our staff and senior level employees. They are our future, and while the group originally started to provide networking and soft skill development, this group has elected to alternate their monthly meetings with a community service project.

Some of our involvement includes:

- Annual CANpaign Food Drive collection location, with 2016 being our top year of collections ever – a 40% increase in giving over the prior year. We track audit vs. tax departments to drive participation. We donated 2,801 items, up from 2,006 in 2015.
- Holiday collection of 375 meals through A Simple Gesture program in our community
- SLA toured hosted 2 United Way member organizations in for a lunch and learn to share how our dollars impact the community in a meaningful way
- Our November 11th United Way kick off included a half day off of team building, which included a fair food and carnival themed games, including a dunking booth.
- During our campaign week, Smith Leonard bought lunch for our entire group via Ken Smith’s Kiwanis Club’s Chicken Feed fundraiser. So in celebrating our United Way giving, we also supported another local cause.
- SLA adopted a family at Christmas and raised over \$600 to provide 3 boys with presents and necessity items like coats, clothes, and shoes.
- We sponsor tables at local chamber and United Way luncheons, which provides 8-10 of our employees with exposure to resources in the community.
- Our October 21 Day of Service deployed all 55 of our employees across the community to volunteer in groups of 10 or less. We were able to connect with several organizations and utilized social media (Smith Leonard Instagram and Facebook) to promote our involvement.
- We host a Bike MS rest stop every year during the Tour de Tanglewood and often encourage our internship candidates to get involved with our team as a first exposure during recruiting season.
- We will be providing teams and sponsorship dollars for 2 new walks in High Point in 2017 – JDRF and American Heart Association
- High Point Young Leaders United – 3 of our team members are regularly involved and we sent 8 total to their first ever Young Professionals Summit.

We are proud of our unique culture and have started using the hashtag “#onlyatsmithleonard” to highlight our activities in the community and showcase that we feel that we are a unique firm, with philanthropy being a key differentiator. These pictures can be found on our Instagram page:
<https://www.instagram.com/smithleonardpllc/>

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

A gift of \$1,000 or more is considered a leadership gift.

12 of our leaders give at the leadership level. 2 of those leaders are heavily involved in United Way specifically, among other community endeavors. All of those leaders gave compelling speeches at our kickoff as to why they give of their time in addition to their money. Another leader is the head of the community involvement committee and led the campaign for 2015 and 2016. She did all of the organizing and execution of the campaign.

Our volunteerism is very transparent. Our leaders speak of their involvement, announce events that these organizations are sponsoring, and invite others to attend meetings and luncheons that highlight those organizations. We keep a running list of board involvement and have a social events calendar in our outlook where everyone can see and plug into different events in the community.

Involvement includes:

- Table sponsorships for Big Brothers Big Sisters events as well as United Way and Chamber luncheons
- Myriad local board memberships (see list above in Standard 1)
- Requests to participate in various Oyster Roasts, Raffles, Silent Auctions, Chicken Feeds, etc. that are sponsored through our local participation in the community and Rotary/Kiwanis organizations.

We also donate our conference room every month for the Boys and Girls Club board meetings, of which one of our managers is a member. This provides a monthly visible reminder of our commitment to volunteerism to all of our associates.

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	50	12	24%	8.9%	
2015	45	8	18%		

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.

We really emphasized the importance of United Way giving and with one of our own as the Campaign Chair for 2016, many that were close to the \$1000 mark stretched and stepped up to the plate to cross over the leadership level.

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 management team places high priority on the United Way Campaign. As previously stated in Standard 1, two of our top leaders (the “Smith” and “Leonard” in Smith Leonard Accountants) have held significant leadership positions within the United Way organization. As such, they are not only motivating our employees, but all participating companies in the High Point area. Our leadership gives significantly, both from a personal and corporate giving standpoint.

Additionally, the time and monetary support put into this campaign was exceptional this year. Our entire office of 50 people were awarded a complimentary half day off for the kick-off campaign. They provided lunch, refreshments, and games for us to use as motivation for our team. Additionally, our 100% participation award was to pay for each of our team members to go see the Ben Affleck movie *The Accountant*. Our managing partner also donated her Myrtle Beach condo for a weekend as part of a drawing for Caring Gift participants.

We also provide a full day off for a day of service for our employees (Oct 21 this year), with most of our volunteer locations having some sort of United Way affiliation. We worked through our local United Way team to source opportunities.

As previously mentioned, we also hosted two loaned executives for a staff-wide lunch and learn to share how our dollars impact the community.

You can find record of our involvement across the community on our Instagram page - <https://www.instagram.com/smithleonardpllc/>

See dunking booth videos on our You Tube Channel - https://youtu.be/-ak_UdPm35k, <https://youtu.be/aF26Zpg0z20>, <https://youtu.be/s07pUTQ3W3A>, <https://youtu.be/SNBqE2XbIFI>, <https://youtu.be/UTDIWYkg75o>

Local corporate numbers are reported below unless indicated as statewide

Year	Corporate Gift	Percent Change
2016	\$ 3800	+8.6%
2015	\$ 3500	

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 campaign coordinator and the community involvement committee met several times over the course of a few months in preparation for this event (and have already started meeting for 2017!!). The coordinator allocated up to 25 hours of work time between meetings, preparations, and the actual event to execute this campaign, which is a dollar value of almost \$1,500.

We were very deliberate in wanting to drive 100% participation and a significant giving increase over 2015, which we accomplished. We provided a large stretch goal of \$40,350, which was derived from our address of 4035 Premier Drive, and were thrilled to blow it out with over \$47,000 in total for 2016. We asked everyone to increase their per-pay period giving by \$6.50 for everyone to bear the brunt of the increased goal.

Additionally, awareness was a main objective, particularly for our younger folks who may have had less exposure to all United Way does in the community. Our October loaned exec lunch and learn of 2 UW organizations for our team was a purposeful message in advance of our campaign to drive awareness and understanding for the impact of giving.

Employees were recognized at planning meetings, in our management group meetings, and then both at the campaign kickoff and wrap-up. We also carry forward our 2015 100% participation incentive as we wear our Smith Leonard fleece jackets this winter. It's a fun way to tell a story as to why our organization generously provided those for us as staff.

Again, a summary of incentives:

- ½ day off for the kickoff
- Allowed to wear jeans and casual clothes on kickoff day
- Food and drinks provided that day, including a local carnival food
- A movie ticket to see the Accountant was provided for each employee for 100% participation
- A weekend prize at Myrtle Beach for 1 Caring Gift participant
- Free lunch during the campaign
- Snack breaks to keep folks motivated and reminded of our carnival campaign theme
- Two \$25 gift cards were used in a drawing on day 1 for those who turned their pledge forms in the same day as the kickoff

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 biggest difference this year in our campaign was having a defined (and well published) stretch goal as well as providing everyone information about the campaign well in advance. Knowing what was coming and what we were striving for really helped people be ready to commit on kick off day. Additionally, strengths of ours were organization, leadership, and awareness. Typical campaigns in year's past have been limited due to the timing for pacesetters and the conflict with several of our major tax deadlines. As a result, campaigns only included a quick kick off meeting in the morning and a gift card drawing for those Caring Gift participants only who turned in pledge cards. We updated this strategy in 2015 and it truly has driven us to success. Advance planning should also really help us, which is why we've already started planning for 2017.

This year, the following helped our campaign:

- Our Director of Resource Development lead the campaign along with a community involvement committee
- There was more of a buzz leading up to the event, including flyers being positioned much earlier, word of mouth about what we were doing, pictures going up as a fundraiser, and the knowledge that we could get to dunk our partners in a dunk tank!
- There were other incentives, including gift cards and a beach weekend giveaway
- We created a fun, memorable campaign, which also served as a great team building event. Those activities included:
 - The dunk tank fundraiser
 - A picture campaign where everyone had a goofy pic of themselves posted on their office door or cube. They could donate to have it taken down or others could out bid them to keep it up during the campaign.
 - The food truck, drinks, and fun carnival games helped solidify our theme

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	\$ 47,919.48	43%		50	\$958.39	+28.7%	
2015	\$ 33,512.40			45	\$744.72		

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

We were all provided the day off from work responsibilities to learn about all United Way does in our community. Each person was given a pledge form on kickoff and was asked to turn in their card that day unless they were out of town. If possible, those people were given the forms ahead of kick off. In order to get into the Vann York car drawing, several folks pledged weeks before the kick off if they knew they wanted to give.

Several of our team members are also on boards for various United Way organizations and are provided time off from work to attend these meetings or volunteer.

New hires are allowed to pledge immediately to begin their payroll deduction with the first paycheck. We provide information forms on the United Way at that time.

We have a very limited number of retirees, as Smith Leonard in its current form has only been around since 2007. This will be a project for future consideration as our leaders begin to retire.

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	50	10%	50	39%		100%	
2015	45		36			80%	

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