

2015 Spirit of North Carolina Campaigning for Excellence

| Application Form <i>(www.unitedwaync.org)</i> | | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|-----------------------|---------------------------------------|
| Company/Organization Name | Thomas Built Buses | | |
| Address | 1408 Courtesy Rd., | City/State NC | Zip 27260 |
| Name of Person Completing this Application | Caley Edgerly/Audrey McManus | Phone 336-881-7274 | E-mail Audrey.mcmanus@daimler.com |
| Name of Sponsoring United Way | United Way of Greater High Point | | Metro Size II |
| United Way Contact for Questions | Bobby Smith | Phone 336.899.0878 | E-mail bobby.smith@unitedwayhp.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 | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---------------------------------------------------------------------------------|
| x | 1. | Volunteer Culture |
| x | 2. | Partnership with Community |
| x | 3. | CEO/Senior Leadership and Involvement and Giving |
| x | 4. | Corporate or Foundation Contributions & Other Non-traditional and In-kind Gifts |
| x | 5. | Employee Campaign Coordination, Incentive and Recognition |
| x | 6. | Overall Per Capita Gift |
| x | 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 type="checkbox"/> Financial/Banking Institutions <input checked="" 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:

Bobby Smith, CEO

Email:

bobby.smith@unitedwayhp.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:

Purpose: We exist to provide the best vehicle that safely transports our children to and from school. The product, services, and performance must be at the highest standards due to the importance of our riders.

Clearly envisioned future: Premier product in pupil transportation. We are sought after by school districts and contractors. Our bus is full of technology that makes the product, production, and safety features truly premier. We service premier and hungry customers. We are a collaborative group, selfless decision makers that focus on performance, customer features, and creating results as partners...breaking preconceived department boundaries and dealer boundaries. Parents want their children riding our bus. We are recognized as the safest, world class, MB of buses. We have a close knit culture at work that supports our convictions. We follow discipline and standardized processes.

Convictions: Positive, Purposeful, Fun, Family, Honesty, Respect, Teamwork, **Responsible**, Hard work and disciplined

Philanthropic Culture: At Thomas Built Buses, we state and live by our convictions. One of the convictions defined, explained, and lived at Thomas is responsible. *Responsible: We know that our actions at work have consequences. We will be mindful of these consequences. Our actions will be aligned with intent to drive improvements for our coworkers, shareholders, customers, **community**, and environment.* We recognize and respect our employees' needs and ability to give. We also recognize that many of us have been blessed with more than others in our community. As such, to be responsible, we will create opportunities for our company and our employees to give back.

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)

On October 20, 2015, we met with Bobby Smith and Jane Liebscher from the United Way along with Randy Parker from GTCC to discuss our 2015 campaign. We at Thomas decided to have an "audacious goal" to increase our level of giving by 26% (or raise \$112,500 through employee giving). In this meeting we discussed ways to accomplish this goal for example, changing our incentive package and creating a sense of friendly competition between our sister plants in the Carolinas, as well as with a local company that they extremely aware of, Mickey Truck Bodies. In summary, we increased our expectations and adjusted our program and were rewarded in kind by meeting a goal that we thought was out of reach.

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.)

In the 2015 United Way Campaign:

- Employees pledged \$114,261.45
- Employee pledges increased 37.64% over 2014
- Thomas Built Buses will match employee donations dollar for dollar making total donation \$228, 523

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

Thomas Built Buses' employees exemplify a very high volunteer culture by participating in the following:

- 2 members of the executive management team serve on the boards for United Way and Salvation Army
- American Red Cross blood drives (estimated 20 hours donated)
- Salvation Army:
 - Canned food drive: 3,500 cans
 - Kettle bell ringing: 40 volunteers (40 hours)
 - Back pack buddies: 250 backpacks filled with school supplies in 10 days
 - Angle tree – donated 165 bikes and helmets plus an additional 60-80 toys
- Oak Hollow Elementary:
 - 20 volunteers / 1 hour per week = 680 hours/school year for the reading buddy program
 - 25 volunteers (175 hours) for end of year carnival and basketball program
 - Donated \$5,500 for:
 - Reading buddy supplies
 - Oakhill basketball
 - End of year carnival
 - Gym equipment
 - Bus of the month incentive
 - "I Moms" and "Father Figures" (parent involvement programs)
- Alzheimer's walk: raised \$5,000 through employee contributions
- STEM (Science, Technology, Engineering and Mathematics) program – local High Point Schools
- Golf Benefit for High Point Homeless Shelter: raised \$1,000
- Columbia, SC flood relief: raised \$550

Estimate of volunteer hours: $100 \times 22.55 = \$22,550$

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

Throughout the course of the year, we review our need to give, and various programs to help out the community:

- General community support topics shared monthly in Executive Staff Meetings.
- Utilize monthly salary staff town hall meetings to highlight various community projects and needs, as well as reinforce our convictions and need to be responsible.
- Publish emails to all employees providing updates on our giving campaigns.
- Creation of friendly competition between departments regarding giving amounts or volunteer time.
- Bell ringers at Christmas for the Salvation Army.

During our 2015 campaign we held several town hall/kick-off meetings where we invite United Way and United Way Agencies to speak directly to our employees on the importance of and benefits the United Way has on our community.

Specific events:

- Brainstorming management session to raise the target goal, create incentives, and show the need to give.
- 7 kick-off meetings in one-day starting at 5:00 am and ending at 5:00 pm to reach 1573 employees.
- An employee shared a personal story of how a United Way partner agency is helping a family member.
- Invited representatives from United Way and one of its partner agencies, The Salvation Army, to speak to our employees during our kick-off meetings.
- Showed the United Way campaign video at each kick-off meeting.
- Shared with our employees a comparison of our 2014 campaign results to the results of Mickey Bodies and Daimler Trucks North America's other Carolina plants (Cleveland, Mt. Holly and FCCC) to ignite some friendly competition, to beat those organizations during our campaign in 2015.
- Ruffled off several prizes.
- Provided pre-printed customized pledge forms to make it easier for employees to complete.
- Discussed campaign goals in leadership team staff meetings .
- Discussed TBB's conviction of **Responsibility** at town hall meeting.
- Thank you email from TBB President on our campaign results (see attached).

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*

- Between the Leadership team and our employee population 15 employees are giving at the “leadership level.” A gift of \$1,000 or more is considered a leadership gift.
- 4 members of the Leadership team are volunteers at Oak Hill Reading Buddies.
- 2 members of the Leadership team are board members at the United Way and Salvation Army.
- Our President sends out emails encouraging giving and volunteerism (example attached).
- Our President arranged to have two Salvation Army kettles at our holiday party for further giving by our employees.
- The Leadership team came up with the idea to wear sports jerseys for the day in exchange for a donation to the Alzheimer’s of North Carolina fundraiser.
- At the company picnic the Leadership team volunteered to participate in the dunk booth challenge to raise donations for Alzheimer’s of North Carolina.

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 | 472 | 15 | 3.16 % | +7.1 % |
| 2014 | 455 | 14 | 3.1 % | +55.55 % |
| 2013 | 443 | 9 | 2.1 | |

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 gift: the company matches dollar for dollar employee’s pledge to the United Way. As a result of this campaign, Thomas Built Buses matched \$114, 261.
- President, Caley Edgerly, serves on the United Way Board of Directors
- Support of the United Way goes beyond Thomas Built Buses and up to our parent company, Daimler Trucks North America (DTNA). The President and CEO of DTNA annually send a message to all employees (including Thomas Built Buses) calling on us to extend our personal generosity to those who are less fortunate and asking us to consider United Way in our charitable giving plans.
- We are Thomas video (see attached)

Local corporate numbers are reported below unless indicated as □ statewide

| Year | Corporate Gift | Percent Change |
|------|----------------|----------------|
| 2015 | \$114,261 | +37.62% |
| 2014 | \$82,695 | +33.73% |
| 2013 | \$62,014 | |

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

- HR spent an estimated 40 hours in preparation and execution of the campaign (initial meeting with United Way, campaign planning meetings, preparing town hall presentations, speaking at town halls, handing out pledge forms, tallying returned pledge cards, preparing for and conducting prize drawings).
- Shared with our employees a comparison of our 2014 campaign results to the results of Body and Daimler Truck North America's other Carolina plants (Cleveland, Mt. Holly and FCCC) to ignite some friendly competition. To beat those organizations during our campaign in 2015.

The following were the incentives offered to our employees:

| <i>Weekly donation requirement</i> | <i>Raffle Prize*</i> | <i>Quantity</i> |
|------------------------------------|------------------------------------------|-----------------|
| \$2 | \$50 gift card to local restaurant | 10 |
| \$4 | Wet N' Wild family (of 4) annual park pa | 1 |
| \$5 | Myrtle Beach get away (valued @ \$500) | 1 |
| \$6 | One week vacation | 3 |
| | 1 - North Plant | |
| | 1 - South Campus | |
| | 1 - Office | |

***Subject to income tax per IRS regulations**

| <i>Requirement</i> | <i>Prize</i> | <i>Quantity</i> |
|---------------------------------------------------------------|-----------------------------------------------------------|-----------------|
| Department with the highest % of contribution \$ (per capita) | Dinner catered in 1 - North Campus 1 - South Campus | 2 |

In addition, if eligible:

- Employees were entered into the Vann York Car giveaway
- Employees received the United Way Caring Club Card

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 set an “audacious goal” and challenged ourselves to increase our total employee giving to the United Way to \$112,500 which was a 26% increase.
- We held 7 town hall meetings over the span of 3 shifts.
- We changed our incentives.
- We created a level of competition by sharing stats of last years campaign results of our sister companies within the Carolinas, as well as, another local company – Mickey Bodies.

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 | \$114,261 | +37.62% | 1573 | \$72.64 | +16.13 % |
| 2014 | \$83,013 | +33.73% | 1327 | \$62.55 | +33.73 % |
| 2013 | \$62,072 | | 1327 | \$46.77 | |

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**

We have a high level of contribution and giving from our employees throughout the year that is widespread within the community. Our total number of givers to the United Way has increased year over year since 2013. While our participation level appears to be lower than last year our total dollar raised this year is the highest ever from TBB. Total giving for 2015 increased by 84% compared to our 2013 giving.

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 | 1573 | +18.53% | 472 | +3.7% | 30% |
| 2014 | 1327 | 0% | 455 | +2.7% | 34.28% |
| 2013 | 1327 | | 443 | | 33.38% |

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