

# 2016 Spirit of North Carolina Campaigning for Excellence



United Way  
of North Carolina

Application Form			
Organization Name	The Timken Company Lincoln Bearing Plant		
Street Address 1000 Timken Place	City/State Iron Station, NC	Zip 28080	
Name of Person Completing Application	Abigail Riley	Phone 704-736-2859	E-mail abigail.riley@timken.com
Name of Sponsoring United Way	United Way of Lincoln 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 type="checkbox"/> 101-200 employees <input checked="" 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 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:**

Kathy Vinzant  
Printed Name

Kathy Vinzant  
Signature

uwlincolnco@bellsouth.net  
Email

## **Organizational Overview**

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

### **Describe the philanthropic culture of the organization:**

Timken's mission is to use our knowledge to make the world's industries work better. Our vision is to be the global leader in bearings and mechanical power transmission, while continually improving performance, reliability and efficiency. Timken continues its rich tradition of supporting global communities where we operate through volunteerism, community leadership and financial support. To make the biggest impact possible, we focus our philanthropic efforts on the following three key areas:

- Education

We promote lifelong learning through our Timken Scholarship Program and by collaborating with leading engineering schools and local Junior Achievement efforts.

- Economic Development/Community

We enhance quality of life wherever we live and work. Our associates donate thousands of volunteer hours supporting personal charities and company-sponsored events as well as fulfilling community leadership roles.

- Human Services/Basic Needs

We foster community health and well-being in collaboration with leading global and local organizations, including Habitat for Humanity, the United Way and regional foodbanks.

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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.**

We believe our United Way dinners, which really serve as United Way rallies, are what most ignited campaign success. We invited all associates to come to a free meal. Due to the number of different schedules worked in the plant, we held 7 dinners so that all associates on every shift were able to attend. At each dinner we first passed out the meals. We then announced incentives we would be offering based on each associate's United Way donation amount. This year we offered water bottles, polo shirts, and pullovers. We also announced that we would be entering all associates who donated to the United Way in a raffle for a chance to win a "Day off with Pay." We gave away three of these days. We also announced the raffle prizes that would be given at a corporate level. This year it included 2 Apple iPad Air2s, 2 Yeti Tundra 110 Coolers, 2 GoPro Hero4 cameras, 10 \$100 Visa gift cards, and 10 Yeti Rambler 20 tumblers. We then had speakers from the United Way of Lincoln County, the Lincoln County Coalition Against Child Abuse and Child Advocacy Center, and the Red Cross of Lincoln County speak about their organizations. Hearing about these organizations and all the good they do first hand really motivated our associates to invest in the campaign. We received great feedback about our United Way dinners, and we plan to continue them in the future.

**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**

Together with local partners, we help strengthen the communities in which we do business. Whether it is contributing to United Way, volunteering for Habitat for Humanity or cooperating with Junior Achievement, our company and team members remain deeply committed to bolstering the arts, education, healthy living and our communities at large. We understand that our success in business and the sum of our individual efforts have the power to move the world. Timken associates are involved in multiple community organizations to help make a positive difference in our community. Timken also outsources a portion of our box making to Salem Industries, a company that provides jobs to adults with mental and physical handicaps.

We focus our efforts on always moving forward, with a bias for action that reflects our values and expertise. Our results show in the practical ways we contribute to the development, health and safety of communities around the world. More details can be found at <http://www.timken.com/about/global-citizenship/>

Timken is definitely viewed as a philanthropic leader and was recognized as such at the annual Lincoln-Lincoln County Chamber of Commerce dinner with the Duke Power Community Award. We are seen as a philanthropic leader because we've built a strong reputation for supporting and encouraging volunteerism among our employees and for distributing financial resources for the greater good of our communities.

We advance the company's efforts to strategically integrate community support with its global business priorities. With community engagement, we strengthen the places where we work and live so that we can continue to attract, retain and engage the associates necessary to support our business growth and the community benefits from the economic impact, quality of life impact and the educational impact.

We do not keep stats on all volunteer engagement for all of our Timken facilities. All around the world, Timken associates donate thousands of volunteer hours through personal endeavors, company-sponsored and community leadership.

The Timken Company has a volunteer policy.

We increase community engagement by matching future generations of Timken leaders with community leadership opportunities and continue to encourage employee volunteerism. Volunteering not only provides the chance to shape the world around us, it also offers professional development opportunities. In addition, we provide financial support to qualifying organizations where our leaders hold leadership positions.

We know that this yields returns not only the community, but also to the employees and ultimately to the company.

We encourage employees at all levels to be active participants in their community through programs that encourage and support volunteerism. Timken volunteers are actively engaged in various programs such as Junior Achievement, Engineer for a Day, Day of Caring, Company United Way campaign planning teams, meals on wheels, Habitat for Humanity, and American Cancer Society Relay for Life, etc.

**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***

Timken works closely with the United Way of Lincoln County to encourage our employees to be involved in the community. Shortly before our campaign kick-off, volunteers participated in the United Way of Lincoln County Day of Action. They painted, cleaned, organized, and much more to create a Family Wellness Center and Clothing Closet at the new Asbury Resource Center. This center will be used to provide children in the community with essential items such as clothing and school supplies.

Our annual United Way dinners generate enthusiasm for giving by allowing associates to hear from the organizations they are giving to first hand. We invite speakers from the United Way and organizations supported by the United Way to our dinners to speak about their organizations and the services they provide. Hearing about these organizations and all the good they do really motivates our associates to invest in the campaign. We also offer annual incentives and raffle prizes for United Way donors to further encourage giving.

To keep the enthusiasm high year round, each month Timken sells raffle tickets for a chance to win a special parking spot. Timken also has staff members buy a sticker that says “I’m Dressed This Way for United Way!” to wear jeans on Fridays. All proceeds from both activities go towards our United Way Campaign. Timken also displays communications from the United Way of Lincoln County on our bulletin boards and in our break rooms year round.

### 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

Senior leadership influences philanthropy, community support, and campaign activities by truly leading by example. Many members of our senior leadership team are heavily involved in the surrounding communities. They volunteer at various organizations supported by the United Way, from the Lincoln County Coalition Against Child Abuse to the Boy Scouts of America. Many also serve on the board for these organizations. Yearly, we have a member of the Timken plant attend Leadership Lincoln. Leadership Lincoln is a Chamber of Commerce program aimed to develop skills and nurture bonds between future leaders of Lincolnton and Lincoln County. Each Leadership Lincoln class plans and implements a community project, such as adding a sensory room to a daycare for special needs children. We are also a member of the Lincolnton-Lincoln County Chamber of Commerce.

The organization’s leadership promotes a culture of giving by educating associates on the needs around them and providing ample opportunities for all associates to help. They also promote a culture of giving by leading by example. To further encourage associate giving, Timken has a matching gift program for up to \$2000 annually.

The leadership team directs the United Way campaign, the Relay for Life campaign, and a Christmas collection for Christian Ministries. They also organize several volunteer opportunities throughout the year such as reading with students at local YMCA summer camps, hosting quarterly honor roll breakfasts at Iron Station Elementary, and teaching Junior Achievement classes at various schools.

#### 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	228	46	20%	-3%	0
2015	223	50	23%		

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.

In 2016 our hourly headcount increased by 39 while our leadership team decreased by 5. Due to the additional hourly donors, our % of leadership givers went down.

**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.**

There is a long history of support for the United Way within Timken, and the United Way campaign is very high in our prioritization of activities. The United Way is the sole non-profit organization supported at a corporate level. Corporate matches all associate donations by 50%. Corporate also offers multiple raffle prizes to associates for donating. This year those prizes were 2 Apple iPad Air2s, 2 Yeti Tundra 110 Coolers, 2 GoPro Hero4 cameras, 10 \$100 Visa gift cards, and 10 Yeti Rambler 20 tumblers. This year corporate offered United Way t-shirts at a subsidized rate to be used as incentives. Corporate also provides fliers and presentations for use during the campaigns.

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

Year	Corporate Gift	Percent Change
2016	\$15,730	0%
2015	\$15,803	

*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 first created a schedule for the United Way Dinners based on the schedules worked by associates. She then worked with a caterer to create a menu. Next, she created fliers for the dinners and had them distributed throughout the plant. She talked with associates to get ideas for incentives. She then designed and ordered Timken water bottles, polos, and pullovers. She created a presentation to kick-off the meals. She also worked with the United Way to organize speakers for the meals. She then gave the presentation at each dinner and introduced the speakers. After the dinners, she entered all the data from the donor forms into one spreadsheet. She completed the raffles, announced the winners, and passed out remaining incentives. She turned in all the necessary paperwork to the United Way of Lincoln County, corporate, and payroll.

The campaign coordinator was thanked at each meal. She was also given a gift card to our company store to recognize her efforts.

For a yearly donation of \$26, the associates were given a black water bottle with Timken printed on it. For a yearly donation of \$104, they were given their choice of a grey polo shirt or a pullover with Timken printed on it. For a yearly donation of \$144 or more, they received both a water bottle and a polo or pullover. Please see pictures attached. For a donation of \$26 or more they were entered into a raffle for "A Day Off With Pay." Three days total were raffled. They were also entered in for the corporate raffle prizes including 2 Apple iPad Air2s, 2 Yeti Tundra 110 Coolers, 2 GoPro Hero4 cameras, 10 \$100 Visa gift cards, and 10 Yeti Rambler 20 tumblers.

### 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**

For a yearly donation of \$26, the associates were given a black water bottle with Timken printed on it. For a yearly donation of \$104, they were given their choice of a polo shirt or a pullover with Timken printed on it. For a yearly donation of \$144 or more, they received both a water bottle and a polo or pullover. For a donation of \$26 or more they were entered into a raffle for "A Day Off With Pay." Three days total were raffled. They were also entered in for the corporate raffle prizes including 2 Apple iPad Air2s, 2 Yeti Tundra 110 Coolers, 2 GoPro Hero4 cameras, 10 \$100 Visa gift cards, and 10 Yeti Rambler 20 tumblers.

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	\$31,357	-1%	0	496	\$63.2	-9%	0
2015	\$31,605			457	\$69.2		

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

Timken hosted seven United Way dinners to ensure that we could accommodate all the different schedules worked by associates. Every employee was invited to attend the United Way dinners, and the dinners were held during work hours. Fliers were posted, emails were sent, and supervisors provided reminders. Several employees reached out to human resources wanting to donate after the campaign had ended. The campaign coordinator followed up with each of these associates to get their donation entered.

We also had a group of new hires training at our plant in Altavista, VA during our United Way campaign. We hosted a special session at the Altavista plant to reach out to these employees, and we had a great turnout.

### 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	496	8%	228	+2%	2.5	46%	0
2015	457		223			48.8%	

*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**

**Standard 1**



**Standard 2**



**Standard 5**



**OR**

