

2015 Spirit of North Carolina Campaigning for Excellence

Application Form <i>(www.unitedwaync.org)</i>			
Company/Organization Name	Wake Forest University		
Address	1864 Wake Forest Road	City/State Winston-Salem, NC	Zip 27106
Name of Person Completing this Application	Kay Bolick	Phone 336-721-9335	E-mail Kay.bolick@uwforysyth.org
Name of Sponsoring United Way	United Way of Forsyth County		Metro Size 3C
United Way Contact for Questions	Kay Bolick	Phone 336-721-9335	E-mail Kay.bolick@uwforysyth.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	
<input checked="" type="checkbox"/>	1. Volunteer Culture
<input checked="" type="checkbox"/>	2. Partnership with Community
<input checked="" type="checkbox"/>	3. CEO/Senior 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, Incentive and Recognition
<input checked="" type="checkbox"/>	6. Overall Per Capita Gift
<input checked="" type="checkbox"/>	7. Participation Level
<p style="text-align: center; color: red;">Heads up: two new items!</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 type="checkbox"/> Manufacturing <input type="checkbox"/> Business Campaign <input type="checkbox"/> City/ County Municipality <input checked="" 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:

Cindy Gordineer / Kay Bolick

Email:

Cindy.gordineer@uwforysyth.org / kay.bolick@uwforysyth.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:

Wake Forest University, a premier Liberal Arts college located in Winston-Salem, NC prides itself on the past, but looks to the future. The WFU motto *Pro Humanitate (For Humanity)* embraces the values of service, compassion and attention for others. WFU sets itself apart from other educational institutions by seeking excellence in both intellectual pursuits and community support, which is demonstrated by faculty, staff and student involvement in the United Way campaign.

Wake Forest University understands, and exemplifies *Pro Humanitate* in the classroom and the community. WFU believes that one of the best ways to bring alive their motto is by participation in the annual United Way Campaign. WFU has a long standing partnership with the United Way of Forsyth County. Dr. Thomas K. Hearn, President Emeritus of WFU, established the Leadership Circle in 1986, and the relationship has only continued to grow.

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)

"16 in '16" Challenge: First time donors were asked to give \$16 per month in 2016 (\$192), and those already giving at the \$192 level were asked to increase their gift by 16%.

All participants who took the challenge were eligible for weekly prizes during the campaign in October. Once you pledged, donors were eligible for the remainder of the month.

- Week 1: \$50 gift card to Starbucks
- Week 2: \$50 gift cards to Olive Garden
- Week 3: \$100 gift card to campus food services (including Starbucks)
- Week 4: Two tickets to the President's Box at BB&T Field for the WFU vs. Duke football game on November 28.

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.)

- The overall campaign raised **\$350,000**, their goal for several years.

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

Bringing to life the spirit of *Pro Humanitate*, faculty, staff and students have shown strong participation in volunteer projects with United Way and the community.

You Will. We will. Wake Will.

- Quote from Debbie Clark, Volunteer Project Coordinator, **Second Harvest Food Bank** :

We have students from the: APO service fraternity volunteer weekly ; members of Delta Zeta every 3rd Wednesday; Kappa Alpha Theta volunteers on Friday; students of the Business School arrange special volunteer days; the Pro Humanitate Institute for their special student and alumni weekends; WFU SPARC, which is their freshman activities group for incoming freshman has volunteered with us for 3 years; a faculty member is in her second year of volunteering with us every first and third Wednesday of the month, and the Office of the University Registrar have volunteered with us. Needless to say, **we are truly blessed by the outpouring of volunteer spirit that is embodied in the staff and student body of WFU.**

- The **Wake 'N Shake Dance Marathon** at Wake Forest University is an annual 12-hour philanthropy event benefiting the Brian Piccolo Cancer Fund Drive.
- **Project Pumpkin**, is an annual service event at Wake Forest University that brings together the campus and Winston-Salem community. Each year more than **1,000 children** from local agencies are escorted to the Reynolda campus where students, staff, and faculty combine to provide a safe environment for trick-or-treating, carnival games, clowns, and entertainment.
- Ongoing, WFU takes part in canned **food drives** to benefit Second Harvest Food Bank in addition to the volunteer hours mentioned in bullet three. And, in October WFU Athletics became a participant in the **"Big 4 Million Meals Challenge"** which seeks to raise 1,000,000 meals for the Feeding America Food Banks in NC. (Project continuing through March)
- Every 56 days, Wake Forest University sponsors a blood drive for the **American Red Cross.**
- **Hit the Bricks** was started in 2003, and each year hundreds of students, faculty and staff gather on Hearn Plaza and take turns running laps around the Quad to raise both awareness and money for the Brian Piccolo Cancer Research Fund

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

WFU does a great job of informing faculty and staff about community assets and needs. WFU knows that educating is the main strategy to increase giving across campus. WFU takes every opportunity to educate faculty and staff. Below are just a few examples:

- **United Way Website:** The introduction of their own internal United Way website in 2014, www.unitedway.wfu.edu to share United Way information with faculty, staff, and students has been very valuable. This site also posted videos from President Hatch, testimonies from WLC and YLU members, and volunteers.
- **Inside WFU:** Each month of the year Inside WFU (the landing page for all WFU computers) posts stories about faculty, staff, and students who support United Way.
- **Spring Impact Tour:** A WFU-only bus tour to the Prosperity Center and Mobile Unit occurred during spring break. Pick-up and drop-off was from the ZSR Library.
- **Young Leaders United** members and recruits were invited to three different drop-in events to enjoy coffee and Krispy Kreme as they learned about the YLU program.
- **Women's Leadership Council Reception:** Women currently in WLC as well as new member targets participated in a gathering at Fratelli's Restaurant to network and learn about WLC and its focus on the High School Graduation rate. Great food, conversation and education!
- **Leadership Circle Breakfast:** Leadership Circle members and prospects met for breakfast to discuss community needs, and the importance and responsibility of leadership.
- **Provost's Happy Hour & Campaign Kick-off** was held at Reynolda Hall. Attendees enjoyed h'orderves and beverages, live music and compelling messages from President Hatch, Provost Kersh, and 2015 UW Campaign Chair Allison McWilliams.

Standard 3 - CEO/Senior Leadership Involvement and 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*

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

Strong CEO involvement was critical to the outstanding campaign results seen at Wake Forest University. President, Dr. Nathan O. Hatch has made a personal and professional commitment to the United Way and the Forsyth County community.

- **Dr. Hatch has served on the Board of Directors** for United Way of Forsyth County and was the **2010 Community Campaign Chair**.
- **Chief Human Resources Officer, Carmen Canales** has served on the Board of Directors and **Provost Rogan Kersh** currently serves on the Board of Directors for United Way of Forsyth County.
- **Four members of senior leadership** served on the 2015 Community Campaign Cabinet. Director, Allison McWilliams, Executive Director, Roger Beahm, Director, Mike Draughn, and Senior Advisor to the President, Mary Pugel.
- **Allison McWilliams, Director Mentoring Resource Center** has served on the **WLC steering committee for four years**.
- Dr. Hatch also hosted a **Leadership Circle breakfast** in his home for current and potential members.
- **Dean Michelle Gillespie** was the featured speaker for a **WLC reception at Fratelli's**.
- **Professor Roger Beahm** went to the **Charlotte Center** to speak about United Way to faculty and staff that are housed there.

Year	Total Number of Givers	Number of Leadership Givers	% of Leadership Givers	Percent Change
2015	750	127	17%	0%
2014	745	127	17%	-3%
2013	765	131	17%	

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.

- WFU successfully solicited vendor Wexford Technology to give a gift of \$10,000 to United Way of Forsyth County.
- WFU employed a **WFU fellow** (with the Office of Personal and Career Development) to assist with campaign planning, kick-off postcards, social media, marketing, and other duties.
- WFU sponsored an afternoon **of focus group sessions** (via WFU Schools of Business) and hosted by Professor Roger Beahm. There were three target groups, WLC, YLU and Department Coordinators. The strategic questions were to learn why they support UW and if they understand our work. Also, to learn what they think of our marketing materials and if we produce measurable results. It was a very informative afternoon.
- Once again, WFU had **five story videos** from faculty and staff on their website that were used to promote the campaign and garner support.
- In addition to volunteer time, WFU also provided **in-kind support** with expenses for the Leadership Breakfast, Provost’s Happy Hour, postcards, snacks and beverages for employee informational meetings, WLC social at Fratelli’s, lunch for Department Coordinator training, coffee for three YLU drop-in sessions, gifts cards for focus group participants and raffles, breakfast for the Pro Humanitate winning team and the finale luncheon for Cabinet members.
- Allison McWilliams set up a **Twitter feed** in 2015 for the UW campaign @WakeUnitedWay.
- A WFU campaign team of **12** leadership employees

Year	Corporate Gift	Percent Change
2015	\$10,000	0%
2014	\$10,000	+100%
2013	None	

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

Employee Campaign Coordination

President, Dr. Nathan Hatch, appointed highly regarded employees to manage the UW campaign. Allison McWilliams was the 2015 chair, and Roger Beahm was co-chair.

Allison and Roger then selected a **committee of ten**.

YLU: Sam Perrota and Stephen Edwards **Communications:** Kevin Cox
WLC: Andrea Ellis and Leigh Stanfield **Department Coordinator:** Vicki Keslar
Fellow: Jana Fritz **Leadership Circle:** Mary Pugel
Facilities: Mike Draughn **Human Resources:** Kelly Segovia

Allison, Roger and their cabinet planned and executed a month of receptions, and informative activities to engage the faculty, staff, and students of Wake Forest University.

Incentives

WFU had a comprehensive incentive plan, asking faculty and staff to take the "16 in '16" Challenge. First time donors were asked to give \$16 per month in 2016 (\$192), and those already giving at the \$192 level were asked to increase their gift by 16%.

All participants who took the challenge were eligible for weekly prizes during the campaign in October. Once you pledged, donors were eligible for the remainder of the month.

- Week 1: \$50 gift card to Starbucks
- Week 2: \$50 gift cards to Olive Garden
- Week 3: \$100 gift card to campus food services (including Starbucks)
- Week 4: Two tickets to the President's Box at BB&T Field for the WFU vs. Duke football game on November 28.

Recognition

Dr. Hatch writes a personal thank you note to every department coordinator, and each leadership circle donor.

Every month Inside WFU (the landing page for all WFU computers) selects a faculty, staff, or student to highlight their United Way story and support.

The WFU United Way website provides a listing of all Leadership

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*

Wake Forest University strives to ensure faculty and staff understand the work of United Way, and the community impact model. In 2015, a few strategic efforts really made a difference.

• **Spring Impact Tour:** A WFU-only bus tour to the Prosperity Center and Mobile Unit occurred during spring break. Pick-up and drop-off was from the ZSR (Z. Smith Reynolds) Library.

□ **"16 in '16" Challenge:** First time donors were asked to give \$16 per month in 2016 (\$192), and those already giving at the \$192 level were asked to increase their gift by 16%. All participants who took the challenge were eligible for weekly prizes during the campaign in October. Once you pledged, donors were eligible for the remainder of the month.

- Week 1: \$50 gift card to Starbucks
- Week 2: \$50 gift cards to Olive Garden
- Week 3: \$100 gift card to campus food services (including Starbucks)
- Week 4: Two tickets to the President's Box at BB&T Field for the WFU vs. Duke football game on November 28.

□ **Department Coordinators Chairperson:** Department Coordinators chairperson, Vicki Keslar served by helping the 65 coordinators plan and communicate to their teams. Kay Bolick with United Way sent out weekly e-mails to each department coordinator with information regarding the responders and non-responders so they could follow-

Year	Total Employee Giving Amount	Percent Change	Total No. of Full-time Employees	Employee Per Capita	Percent Change
2015	\$340,000	+1%	1883	\$180.56	+2%
2014	\$335,738	+3%	1900	\$176.70	+3%
2013	\$327,881		1915	\$171.22	

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. **Up to 10 points***

- **New Hires Program:** United Way is invited to participate in new hires orientation to highlight community needs, show the commitment that WFU has to United Way, and encourage employees to begin payroll deduction immediately.
- **President Hatch** headed up the **retirees** campaign, writing personal letters to all retirees. WFU retirees contributed \$11,085 to the WFU campaign!
- **Department Coordinators:** Each Department Chair nominated a volunteer from their department to serve as the United Way coordinator and liaison for this year's campaign. Each coordinator (**65 of them**) had meeting(s) with his or her department, to spread the word about United Way.
- **Competition:** For the first time in 2015, WFU sponsored a **Pro Humanitate Institute/Office of Wellbeing Champions Challenge**. At the end of October, the team with the highest percentage of participation was named the 2016 Pro Humanitate Institute/Office of Wellbeing Champion and was honored with a full breakfast. There were 11 teams, each named after a former WFU president. The Facilities group - Team Taylor - won!
- See Standard 2 for the many ways WFU promotes United Way via website, e-mail, and social media.
- **Dean Michelle Gillespie** spoke on behalf of United Way at the **September college faculty meeting**. **Professor Stan Mandel** spoke at both the **Business School** as well as **faculty and staff meetings**. United Way staff spoke at several employee meetings with Facilities as well as Department

Year	Total Number of Employees	Percent Change	Total Number of Givers	Percent Change	Percent Participation
2015	1883	+1%	750	+1%	40%
2014	1900	+1%	745	-3%	39%
2013	1915		765		40%

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

Project Pumpkin



PROGRAM

Campus Kitchen

DESCRIPTION

Hunger; Direct Service

A student-led food rescue and redistribution program that partners with community agencies to utilize prepared food and fresh produce as a resource to organizations and individuals in the Winston-Salem community.

Hit the Bricks

