

## 2015 Spirit of North Carolina Campaigning for Excellence

Application Form <i>(www.unitedwaync.org)</i>			
Company/Organization Name		Wells Fargo - Burlington	
Address	500 S Main Street	City/State Burlington/ NC	Zip 27216
Name of Person Completing this Application	Reed LaPlante	Phone 3362293644	E-mail Reed.a.laplante@wellsfargo.com
Name of Sponsoring United Way	United Way of Alamance County		Metro Size 154,378
United Way Contact for Questions	Lauren Berk	Phone 336-438-2000	E-mail lberk@uwalamance.org
Does the company know a Spirit Application has been submitted on their behalf?			X 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 type="checkbox"/>	1. Volunteer Culture
<input type="checkbox"/>	2. Partnership with Community
<input type="checkbox"/>	3. CEO/Senior Leadership and Involvement and Giving
<input type="checkbox"/>	4. Corporate or Foundation Contributions & Other Non-traditional and In-kind Gifts
<input type="checkbox"/>	5. Employee Campaign Coordination, Incentive and Recognition
<input type="checkbox"/>	6. Overall Per Capita Gift
<input type="checkbox"/>	7. Participation Level
<p><b>Heads up!</b></p> <p>Please <b>do not</b> 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

<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 50 employees <input checked="" 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 checked="" 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:**

Heidi Norwick

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**Email:**

hnorwick@uwalamance.org

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## **Organizational Overview**

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

### **Describe the mission, vision and philanthropic culture of your organization:**

At Wells Fargo, caring for customers and communities is embedded in our culture. We strive to create a positive, lasting impact - socially, economically, and environmentally – through our operations, business practices, philanthropy, and community engagement. We are consistently ranked as one of the country's top corporate philanthropists. This is not about charity. It's about intelligent and thoughtful investing in the future of the communities where our team members and customers live and work. Our team members understand that small efforts can make a huge difference in our communities.

- Wells Fargo Corporate Vision & Values (pg21)

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### **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)**

In the month of September each year, Wells Fargo has a company-wide campaign for community support. In Alamance County, we used that corporate push to highlight all the ways that the United Way in Alamance County helps to support our community. As the campaign coordinator, I also set a goal for our team that if we could raise participation from the previous year by 50% I would shave my the hair off my head (4-5inches in length). I also highlighted that every dollar counts and paired our giving through payroll deduction with a United Way basket raffle. Our team members exceeded that goal with a participation rate of 67.12% in 30 days. We celebrated with a breakfast and a head shaving!

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### **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.)

- Wells Fargo's 2014 participation rate was 9.7% and the 2015 participation rate overall to 47.37% across all branches and to 67.12% in the Burlington branch alone.
- Wells Fargo raised 13,796.50 in 2015, up 148.41% from 5,554.00 in 2014.
- Wells Fargo increased their number of donors by 400% from 9 donors in 2014 to 45 donors in 2015.

## **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***

Our team members understand that small efforts can make a huge difference in our communities. We care deeply about our communities and we volunteer our time, serve on nonprofit boards and contribute to local charitable organizations. United Way Worldwide has consistently recognized Wells Fargo for having one of the nation's top United Way campaigns. Wells Fargo gives each team member 16 hours per year of volunteer time away from work. If each team member utilized their time, the additional contribution to Alamance County would be about \$26,000. Of the employees that submit a report on our system, there is a total of 159 hours volunteered. At \$22.55/hour, the time value is \$3,585. Here are the organizations at which Alamance Co. team members volunteered:

- Alamance Christian School
- Allied Churches of Alamance County Inc.
- American Red Cross
- Blessed Sacrament School
- Boy Scouts of America
- Boys and Girls club Burlington, NC
- Burlington Downtown Corporation
- Cards for Hospitalized Kids
- Cinderella's Closet
- Dottie's Diner Feed the Community
- Elon Elementary School
- Graham Rotary Club
- Green Chair Project Inc.
- Habitat for Humanity of Greater Greensboro
- Habitat for Humanity of Alamance
- Lil Treasures Afterschool & Summer Camp Program
- Little Pink Houses of Hope
- Little Treasures daycare
- Lutheran Retirement Services (Twin Lakes)
- Monahan Family and Cosmetic Dentistry
- Moravian Ministries Foundation in American
- Raleigh Rescue Mission Incorporated
- Residential Treatment Services of Alamance
- Ronald McDonald House of Winston-Salem Inc.
- Trailhead Church
- United Way Alamance County
- University of North Carolina Hospitals at Chapel Hill

**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**

We commit the month of September to employee giving. Every week there is a message from leadership regarding the giving of time, talent and financial resources. International campaign materials are created and personalized at the local level. Our 2015 campaign theme was *Small is Huge: It all adds up to make a difference* to focus our team members on the fact that giving in whatever way at whatever level will make a difference in the community.

Annually we have a rally for the Community Support Campaign programing running similarly as described in Standard 5.

Annually there is awareness of a Habitat for Humanity House that is being built in our area for support and volunteering.

Wells Fargo also allows for organizations to apply for grants through the Wells Fargo Foundation. Our local team here works closely with those organizations to bring those funds to Alamance County. On average, we are able to make an annual impact to Alamance County of around \$64,000 dollars. When those funds are dispersed we celebrate together as a term to present those funds to that organization.

**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\***

A gift of \$500 or more is considered a leadership gift.

Our local senior leadership is run by our market president who stays involved with United Way and has run the campaign for our United Way in the past. I would say each of our managers for our locations is involved in a volunteering, or non-profit leadership position that would have some ties to United Way. For years, many team members have helped on the campaign committee or were called on behalf of United Way to other companies to drum up annual support. Our managers and senior sales professionals volunteer much of their time, talents, and personal funds in an effort to give back and invest in our local community.

**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	45	3	6.67%	+50%
2014	92	2	2.17%	-33.33%
2013	106	3	2.83%	+11.32%

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.**

We commit the month of September to employee giving. Every week there is a message from leadership regarding the giving of time, talent and financial resources. International campaign materials are created and personalized at the local level. Our 2015 campaign theme was *Small is Huge: It all adds up to make a difference* to focus our team members on the fact that giving in whatever way at whatever level will make a difference in the community. The campaign tools are numerous.

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

Year	Corporate Gift	Percent Change
2015	\$8,000	+563.67%
2014	\$1,200	0.0%
2013	\$1,200	

*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***

Our campaign coordinator worked throughout the month of September to run meetings with staff at each of the company's locations to talk about United Way Alamance County and the Community Support Campaign. We talked about agencies in the community that receive support, the focus of United Way Alamance County and how that matches with our corporate vision and values. We highlighted the other incentives:

- Auto Rally Drawings
- Campaign Coordinator Head Shaving
- Raffle Baskets
- Participation goal team celebration

Each corporate location had 2-3 meetings during the month of September and emails were sent out weekly to all team members. Raffle drawings took place on September 30<sup>th</sup> and a prize patrol was sent out October 1<sup>st</sup> to deliver the raffle baskets.

After the participation numbers were tallied and we reached our goal, a celebration date was scheduled.

Our campaign coordinator threw a morning party with United Way Alamance County staff on October 22<sup>nd</sup> and his head was shaved in front of the management team.

Our campaign coordinator then brought by breakfast over the next two weeks to each team location to say thank you, watch the YouTube video of the head shaving, and celebrate the impact the team had on the local community.



### 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\***

Reed LaPlante, Business Banker, was the campaign coordinator for Wells Fargo in Alamance County. He rallied the managers of each the branches in Alamance to help raise awareness for United Way Alamance County. The store managers worked with Reed to set meeting dates that would involve as many team members as possible. It was noticed that in the first set of meetings and kick offs for our campaign, employees only thought they could give if they gave at the Auto Rally level, which is \$52 and above. Even after that first set of meetings we had a massive increase in participation. Reed then worked with the managers to ensure every dollar made a difference and that the sum of smaller donations would make an impact. Reed put together two raffle baskets with snacks and gift cards for the employees that participated. One basket was to be raffled to the auto rally sized donors and the other basket was to be raffled to the smaller dollar donors. Those baskets added more donors and another several hundred dollars that were immediately donated to United Way Alamance County. Our management/ leadership team was instrumental in keeping the awareness alive during the month of September. As we celebrated our success, each location commented about the joy they felt knowing that our team in Alamance County was able to impact many people in our community. We are excited to see the participation rate next year.

**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	\$5,796.50	+33.13%	95	\$61.02	+28.92%
2014	\$4,354.00	-54.25%	92	\$47.33	-47.28%
2013	\$9,519.00	-19.4%	106	%89.77	+16.36%

*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\***

Wells Fargo runs a campaign each September called the Community Support Campaign. This Campaign allows all team members to list what organizations they would like to donate to through payroll deduction in the following fiscal year. In Alamance County, we used that corporate campaign to focus on United Way Alamance County. As each new employee is on boarded they also have this opportunity to start payroll deductions for non-profits that they wish to donate to.

**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	95	+3.26%	45	+384.36%	47.37%
2014	92	-13.6%	9	-13.6%	9.78%
2013	106	0.0%	12	-40.01%	11.32%

*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*