# 2018 Spirit of North Carolina Application

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>BE&amp;T</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street Address</td>
<td>200 West Second Street</td>
</tr>
<tr>
<td>City/St:</td>
<td>Winston-Salem, NC</td>
</tr>
<tr>
<td>Zip:</td>
<td>27101</td>
</tr>
<tr>
<td>United Way Name</td>
<td>United Way of Forsyth County</td>
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<tr>
<td>Application Contact</td>
<td>Name: Mark Uren</td>
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<tr>
<td></td>
<td>Email: <a href="mailto:mark.uren@uwforsyth.org">mark.uren@uwforsyth.org</a></td>
</tr>
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<table>
<thead>
<tr>
<th>Organization – Employee Size</th>
<th>Type of Organization</th>
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<tbody>
<tr>
<td>Check the appropriate box</td>
<td>Check the appropriate box</td>
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<tr>
<td>□ Up to 25 employees</td>
<td>☐ Financial/Banking Institutions</td>
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<tr>
<td>□ 26-50 employees</td>
<td>☐ Manufacturing</td>
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<tr>
<td>□ 51-100 employees</td>
<td>☐ Business Campaign</td>
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<tr>
<td>□ 101-200 employees</td>
<td>☐ City/County Municipality</td>
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<tr>
<td>□ 201-500 employees</td>
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<td>□ 501-1000 employees</td>
<td>☐ Hospital/Health System</td>
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<tr>
<td>□ 1001-1500 employees</td>
<td>☐ Retail</td>
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<tr>
<td>□ 1501-2500 employees</td>
<td>☐ Not-for-Profit Agency - 501(C)3</td>
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<tr>
<td>☑ 2501-5000 employees</td>
<td>☐ Professional Services (small business, partnerships, LLC accounting, architect, engineering firm, attorneys, etc.)</td>
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<tr>
<td>□ 5001+ employees</td>
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## Standards of Excellence Checklist

1. Community engagement and volunteer culture – **OUTSIDE OF UW RELATIONSHIP**
   - Up to 5 Points

2. Partnership **WITH UW** to raise community awareness of needs & foster a spirit of giving
   - Up to 5 Points

3. CEO, Senior, and General Leadership Involvement and Giving
   - Up to 10 Points

4. Corporate or Foundation Contributions & Other Non-traditional and In-kind Gifts
   - Up to 5 Points

5. Employee Campaign Coordination, Recognition and Incentive
   - Up to 5 Points

6. Participation Level
   - Up to 10 Points

7. Special Events
   - Up to 10 Points

Signature of the nominating United Way CPO or his/her designee:

Mark Uren

Printed Name

[Signature]
Organization Overview
Summary for use during Awards Ceremony

Briefly describe the philanthropic culture of the organization.

A key component of BB&T's mission can be found in the statement "Making the Communities in which we work better places to be."

This quote from BB&T's Chairman and CEO Kelly King really sums up their commitment and culture:

"BB&T has built our success as a community-based bank, and we know this is a tough and challenging period for our communities and our country. We can't think of a better reason or time for us to focus our energy on helping others."

To this end, BB&T has chosen United Way as its partner to bring their mission to life! United Way the only non-profit that BB&T partners with across its footprint, and the only partner allowed to solicit BB&T associates.

Share ONE creative strategy, engagement opportunity, volunteer activity OR special event that ignited campaign success

Before the start of this year's campaign, all champions and campaign volunteers participated in a bus tour to learn first hand about our work to end homelessness in Forsyth County, an issue they had asked to learn more about.

Over 50 employee champions attended this tour and took what they learned back to their teams.

This tour gave these volunteers a unique look into how many of our partners are working together to support our community and how this ties directly helping end homelessness and how many of the issues around homelessness are inter related.

The volunteers were able to use this first hand experience as they discussed the value of our United Way with the associates they were responsible for engaging.

Three NUMERICAL successes you wish to highlight:

- [Grab your reader’s attention with a great quote from the document or use this space]
- [Grab your reader’s attention with a great quote from the document or use this space]
- [Grab your reader’s attention with a great quote from the document or use this space]

  - Golf tournament raised over $125,000
  - Over $150,000 donated from the Executive Leadership team
  - Over 125,000 volunteer hours from Associates last year.
Standard 1 – Community engagement and volunteer culture within the community footprint. Exclude UW partnership and focus on other organizations that the company works with to build a stronger community.

Up to 5 points

For example:
- Describe how the organization works in tandem with community stakeholders to problem solve and create solutions that build stronger communities.
- Does the organization have a social responsibility policy or statement? If so, provide some highlights of the mission.
- Is the organization seen as a community philanthropic leader and why?
- How does the organization benefit from being involved in serving the community?
- Are there specific ways the organization builds a volunteer culture?
- What % of employees are engaged in volunteer work in the community?

BB&T is committed to putting their mission into action, and doing their part to improve the communities in which they serve. This quote is from their website: “It is our privilege to offer service and corporate financial support to many overwhelmed and underfunded nonprofit organizations that continue to struggle in a challenging economic environment.”

Here are a couple of examples:
- Over 300 BB&T employees gave 3,100 volunteer hours for Day of Caring at mineral Springs Elementary School. Volunteers assisted teachers as they prepared their classrooms for the upcoming school year, provided maintenance and beautification of the school playground and gardens. BB&T provided all materials, investing $10,000. The day’s work proved to be a very rewarding experience for all.
- For the tenth year in a row, BB&T CEO Kelly King held the “Lighthouse Projects” providing a $3 million budget along with up to 6 hours of paid time for each employee to support approved projects at local non-profit agencies. Over 325,000 volunteer hours were provided that impacted more than 9.7 million people.

BB&T does have a Social responsibility statement and it is closely aligned with their organizations mission statement. Part of their mission is to make the communities we serve better places to be. This statement is a key element not only in their organizational mission, but is a driving part of their CSR. CEO, Kelly King often references this statement when talking about why BB&T is involved with the United Way.

BB&T is absolutely seen as a philanthropic leader in every community it serves. Not only does it support our community financially, it encourages its employees to give back through volunteer work and other community service. Because of their philanthropic role, our community has a deep respect for BB&T and their employees in general are very proud to work for such a socially active company. They truly believe that when the community does better it is also good for their business.

All employees are encouraged to volunteer and many do on a regular basis. BB&T gives each employee paid time off in order to volunteer and additional time off to participate in their day of caring and project light house volunteer events.
Standard 2 – Organization’s partnership WITH UNITED WAY to raise community awareness of needs and foster a spirit of giving. Up to 5 points

- How does this organization’s philanthropic priorities align with the local United Way mission or initiative work? Where is synergy created because of United Way partnership?
- What innovative process, product, or programs were used to elevate community engagement and increase volunteer or giving action?
- Comment on year-round engagement that exists, if applicable.

BB&T works very hard to educate and engage their employees around the United Way and our work in the community. Their involvement with the United Way is a year round partnership that includes volunteer opportunities and multiple learning opportunities throughout the year.

Some examples of these activities are:

- Impact bus tours for employees to see different aspects of United Way work, hear from many of our agencies and see the need first hand.

- Monthly engagement updates are sent to employees to give them an update around United Way’s work and to hear stories from our partners.

- Monthly meetings for YLU and WLC members to further engage in United Way’s work.
- Monthly volunteer opportunities for YLU members.

- BB&T has a United Way committee that meets year round. For the most part the focus is on the campaign, but they also work on employee engagement, volunteer and learning opportunities, marketing and events. This group works directly with United Way staff to enhance engagement and to increase understanding of the United Way.

- Day of Caring and Light House volunteer projects provide and opportunity for all employees to learn about the needs in our community while volunteering their time to help, BB&T allows employees to participate on company time.

- BB&T funded a step up match program for the community wide WLC. The match allowed women to step up to WLC giving amount ($1,000) over 5 years. BB&T funded this at $100K/year for five years.
Standard 3 - CEO/Sr. Leadership & General Leadership Involvement & Giving

Up to 5 points for description and specific event details
Up to 5 points for increase in leadership giving or consistent/stable giving by leadership

- Define leadership giving – company and/or united way criteria
- Describe role that senior leadership plays in “influencing” philanthropy, community support, & campaign activities
- List any specific events that are directed by the leadership team

Up to 5 points:

Support for the United Way has definite top down support at BB&T, starting with CEO Kelly King. Kelly and all of his executive team are not only all Tocqueville donors, they also actively volunteer and encourage other team members to learn more about the United Way and to consider giving their time and financial support. Below are some examples of this support:

- Kelly King hosts a breakfast for all associates that give or are capable of giving at the Leadership Circle level the encourage support and to inspire and educate them about the United Way. Kelly also hosts a smaller breakfast for Tocqueville donors with a similar purpose.

- BB&T provides and Executive manager each year to support United Way activities, including the annual campaign. In 2018 Bennett Bradley provided this support; bennett is also a member of the United Way board of Directors.

- Kelly King and his executive team host and employee appreciation day at the end of each United Way campaign, this is open to all employees, not just United Way donors, but it is a definite United Way event. In 2018 the appreciation was held at a Winston-Salem Dash baseball game, complete with a picnic and events for families during the game.

- Chris Henson, the COO, is the Chair of the 10 year plan to end Chronic Homelessness, a United Way initiative.

- Executive team member Barbara Duck, was instrumental in starting WLC in Forsyth county. She also helped secure a 5 year commitment of $100,000/year for a county wide WLC match that helps recruit new WLC members community wide

Complete the chart below. Up to 5 points

2.5 points awarded for any positive % change in number of leadership givers
Additional 2.5 points awarded for 10% or greater increase in number of leadership givers
Judge’s discretion - Points awarded for consistent leadership giving for companies less than 100 employees - 2.5 points

<table>
<thead>
<tr>
<th>Year</th>
<th>Total # of Givers</th>
<th># of Leadership Givers</th>
<th>% Change in # of Leadership Givers</th>
<th>Pts Awarded for positive % change</th>
<th>Pts Awarded - 10% increase or greater</th>
<th>Pts Awarded – Judge’s Discretion</th>
<th>Total Points</th>
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<tbody>
<tr>
<td>2018</td>
<td>1507</td>
<td>399</td>
<td>-3%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>1559</td>
<td>455</td>
<td></td>
<td></td>
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% of Leadership Givers = 2018 # of leadership givers divided by 2018 total # of givers = % of Leadership Givers
Does the % increase from 2017 to 2018? If so, award 2.5 points – if greater than 10% award additional 2.5 points

Provide comments re: small companies (less than 100 employees) who have no change in Leadership Givers:

BB&T experienced a reduction of employees which resulted in many previous leaders either no longer employed or moved from this market. We had many new givers at this level, but it was difficult to make up for the loss in numbers.
Standard 4 – Corporate or Foundation Contributions and Non-traditional/In-kind Support  Up to 5 Points

- List specific sponsorships, resources, materials, loaned executives, advertisements, videos, etc. that support the United Way campaign.

Nonprofits and Federal organizations who cannot participate in corporate giving will be judged separately and the point value of this standard removed from the total possible earned points. Consideration will be given to small organizations whose employees participate but due to size are unable to also provide a corporate gift.

BB&T provided $315,000 in corporate gifts.

BB&T committed $500,000 to continue United Way of Forsyth County’s Women’s Leadership Council step-up challenge match.

BB&T provided $500,000 in support of United Way’s Ten Year Plan to End Chronic Homelessness.

BB&T has a program of giving to special projects of United Way partner agencies. These gifts totaled over $99,000 in 2018.

BB&T also offers a matching gift program to assist Leadership Circle donors in reaching the next level of Leadership Circle giving. A special match is also offered to assist senior-level executives become Tocqueville Leadership Society members.

BB&T provided all materials for Day of Caring; this included $10,000 for landscaping, painting, and other supplies. BB&T also provided lunch and other drinks and snacks for all volunteers, clients and families during the day.

BB&T is also the lead financial sponsor of a new poverty task force that is being developed by our United Way to look at issues of poverty and equity in our community.

<table>
<thead>
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<th>Year</th>
<th>Corporate Gift</th>
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<tbody>
<tr>
<td>2018</td>
<td>$315000</td>
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• Describe the work of the campaign coordinator and/or committee, listing successful planning tools, specific activities, and strategies 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
• Share any “social media” communication that propelled momentum and increased participation

The 2018 BB&T United Way Campaign Cabinet began planning this year’s campaign in March and included 25 associates from all functions of the company.

Led by Oscar Santos and Desiree Partin, the Cabinet was responsible for development, planning and execution of all aspects of the campaign. The committee set its sights on increasing Leadership giving and participation.

The Cabinet was supported by 60 Campaign Champions representing each department and branch location. All Champions:

• Attended a training session
• Became familiar with United Way’s Priority Issues/Community Impact Agenda
• Organized Employee Meetings
• Kept co-workers informed of campaign events and progress

Cabinet members and Campaign Champions donated generously of their time and energy, providing more than 1,000 volunteer hours to the campaign alone.

Incentives
• Employees who have not given before or given less than $250 were encouraged to increase their giving with a raffle for vacation days, Carolina Panthers Football tickets, Hurricane Hockey tickets, WFU football tickets, and NASCAR racing tickets and PTO. Employees that gave at or above $250 were eligible for prizes with a 10% increase.

• BB&T’s Women’s Leadership Council and Young Leaders United participated in the “pace-setter campaign.” All employees who renewed their membership or joined for the first time were put into a special drawing for 12 additional paid days of vacation.

• BB&T Champions were given the opportunity to win VISA gift cards and BB&T merchandise by planning and executing creative special events.

Matching Gifts & Recognition
• To offer further recognition for its employees, BB&T offers a matching gift program to assist Leadership Circle donors in reaching the next level of Leadership Circle giving. A special match is also offered to assist senior-level executives in becoming members of the Tocqueville Leadership Society.

• BB&T offered a two-year matching program to assist in reaching Leadership Circle or the next level of Leadership Circle. Example: an associate giving $400 today can move to LC over three years:

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
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<tbody>
<tr>
<td>Associate</td>
<td>$400</td>
<td>$600</td>
<td>$800</td>
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<tr>
<td>Match</td>
<td>$ 0</td>
<td>$400</td>
<td>$200</td>
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Standard 6 – Participation Level

Up to 5 points for description

5 points awarded for growth in number of givers

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, etc.

Up to 5 points

The participation level for the 2018 campaign was 81%

Each year, all employees attend a United Way meeting. Each department and branch location has a Campaign Champion to coordinate the campaign. All employees were also required to attend a United Way meeting and log onto the pledge website, whether they chose to donate or not.

As part of this year’s campaign, employees participated in
- Employee kickoff event
- WLC office parties
- YLU lunches, mixers, and breakfasts
- Day of Caring
- Special event raffles
- BB&T Golf Tournament
- Lighthouse Projects

All of these activities brought attention to United Way services in our community and encouraged employees to participate with both their time and dollars.

Retirees are invited to attend, the kick-off, Day of Caring and golf tournament! In 2016 Retirees contributed over $70,000 to the BB&T campaign.

BB&T has a new hires program that includes a United Way representative to present local information and ask employees to start giving when they are hired. BB&T also places focus on their Leadership Development Program; with employee meetings and incentives to join Young Leaders United.

Local corporate numbers are reported below unless indicated as □ statewide

5 Points Awarded for increase in % participation

% Participation = # of givers divided by # of employees
Change in % Participation - 2018 % participation minus 2017 % participation

<table>
<thead>
<tr>
<th>Year</th>
<th>Total # of Givers</th>
<th>Total # of Employees</th>
<th>% Participation</th>
<th>Change in % Participation</th>
<th>5 pts awarded for increase in % participation</th>
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<tr>
<td>2018</td>
<td>1507</td>
<td>1855</td>
<td>81</td>
<td>+4</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>1560</td>
<td>2015</td>
<td>77</td>
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- Successful special events are often the catalysts that educate and energize campaigns. Share creative event details on ONE outstanding special event used to motivate/excite/reach employees and community.
- How did the event attract or impact potential and ongoing donors/volunteers?
- Describe event/impact results (quantitative and qualitative, if possible)

- Champions Impact tour – over 50 campaign champions attended a 2 hour bus tour that focused on our collaborative work around education in around our homeless work. This group was able to use what they learned to talk to their associates first hand about our work.

- Leadership Circle Breakfast- CEO, Kelly King hosted a breakfast that was attended by over 500 current or perspective leadership circle members. The focus was on highlighting why our work matters in the community and why BB&T believes it’s important to support the United Way and why it’s important for them to be community leaders as well.

- Tocqueville cocktail reception- The executive management team, including CEO Kelly King, hosted a reception at Milton Rhodes Center. Over 50 key leaders attended and learned more about our work and why this work is important to BB&T.

- Day of caring – Over 200 associates participated in a day long volunteer project at Mineral Springs Elementary school, one of the schools that is supported through our education work. This gave associates a first hand look at the one of the schools we work in and gave them an opportunity to work hand in hand with teachers and administrators as they prepared for the upcoming school year. During lunch, they heard from the principal as she talked specifically about the programs we fund that are supporting their kids.

- Employee appreciation event at the Winston-Salem Dash- BB&T sponsored an event open to all employees and their families that involved a picnic and baseball game at our local minor league affiliate. This served as the United Way campaign celebration as well. Throughout the game, videos played that highlighted United Way and our work in the community. This was a great way to thank the employees and engage their families.

BB&T conducted a golf tournament for employees and vendors. Employees were allowed a day off work to participate and the proceeds were over $125,000.