

2015 Spirit of North Carolina Campaigning for Excellence

Application Form <i>(www.unitedwaync.org)</i>			
Company/Organization Name	FirstHealth of the Carolinas, Inc.		
Address	PO Box 3000, 155 Memorial Dr.	City/State Pinehurst, NC	Zip 28374
Name of Person Completing this Application	Wes Cowell & Chris Miller	Phone 910-715-1093 & 910-715-5467	E-mail mccowell@firsthealth.org cpmiller@firsthealth.org
Name of Sponsoring United Way	United Way of Moore County		Metro Size 6
United Way Contact for Questions	Linda Pearson	Phone 910-692-2413	E-mail linda.pearson@uwaymoore.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 and 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>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 type="checkbox"/> 1501 - 2500 employees <input checked="" 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 type="checkbox"/> Higher Education <input type="checkbox"/> School Campaigns <input checked="" 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:

Linda Pearson

Email:

linda.pearson@uwaymoore.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:

FirstHealth of the Carolinas (FirstHealth) is a comprehensive health care system based in Pinehurst, North Carolina. The 2015 United Way campaign occurred in system's four hospitals in Hoke, Montgomery, Moore, and Richmond Counties. "To care for people" is the FirstHealth organization's core purpose, and it's supported by the 2020 Vision—"working together, first in quality, first in health"—a phrase that not only summarizes how we care for people but also offers a pledge to the future.

- Working together: The organization is large and capable, but it works best when it works with others through hundreds of partnerships and dozens of task forces throughout the entire service region. The hospital system can accomplish a lot, but so much more by working with others.
- First in quality: While primarily a manifestation of the excellent medical care provided by medical providers and staff, this component of the 2020 Vision applies to all community services.
- First in health: The system works to help the communities served to be as healthy as possible. That aim begins with education, is achieved with support and resources, and is delivered by a dedicated and highly trained staff.

Fundamentally, "working together" to be "first in quality" and "first in health" brings us closer to achieving the lauded goal of lower health care costs. It also makes our region more attractive to new businesses, new families and increased economic development.

A sign of the organization's philanthropic spirit is through its community benefit program. In FY14 (FY15 analysis being conducted at the time of award submission), FirstHealth provided Community Benefit with a value of over \$43 million which included over \$29 million for charity care and non-reimbursed costs for Medicaid patients. FirstHealth community benefit includes not only charity care for patients but also community programs targeting the regions underserved including but not limited to community health promotion/disease prevention classes, dental health programs for youth, a tobacco use prevention and cessation program, transportation services, and a medication assistance program.

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 order for a campaign to ensure success, employee donors must understand the organizations supported by the United Way in our region. Captains for each department are exposed to presentations from partner agencies during annual training, but the more meaningful opportunity for these captains to get to know the organizations and thus be able to share information with fellow employees is the opportunity to have time away from the hospital to volunteer at annual Day of Caring volunteer events. Hands on exposure to the partner organizations bring meaning to the campaign and an added reality of those being helped by the campaign.

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.)

- Matched our highest ever campaign total with @ \$200,000 pledged
- Average pledge per campaign participant increased from \$82.88 to \$92.16
- Thirteen New Leadership Society (\$1000) givers

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

The core purpose of the FirstHealth organization is "to care for people". FirstHealth employees and this organization believes that caring for people extends far beyond the walls of traditional hospital settings, and they generously give their time to hundreds of civic, church, school and community projects. More than 4,600 employee hours were contributed toward implementation of FirstHealth community benefit activities in 2014 as part of a community benefit contribution of over \$4.1 million. As an organization, FirstHealth of the Carolinas provided community benefit in the amount of over \$43 million (2015 figures are not complete at this time).

FirstHealth of the Carolinas supports employee participation to volunteer time in the community. The purpose is to encourage and reward employees who volunteer their personal time to participate in projects and initiatives consistent with FirstHealth's community benefit philosophy. Eligible employees who participate in an approved community benefit effort receive one hour of paid-time-off (PTO) for every two hours of work on the project or initiative. The maximum per calendar year incentive for an employee is 20 PTO hours, unless the project or initiative has been approved for additional incentive by the CEO. During 2015, 31 employees received incentive PTO valued at almost \$8,153 (actual cost) for 677 hours of volunteer "work."

At Moore Regional Hospital, a food drive was held to collect for the Moore County Backpack Pals program. Employees donated 3,200 pounds of individually packaged food items as well as more than \$3,300 in money or gift cards for a total equivalent of 19,674 meals for approximately 1,100 children in Moore County.

In 2015, FirstHealth additionally provided paid time to participate in the "United Way Day of Caring." Eight employees worked 44 hours valued at \$1,015 (2014 estimated value of volunteer time-\$23.07/hr).

Activities conducted by participants included:

- Painting
- Yard/garden work
- General repairs and cleaning
- Food pantry
- Client clothing/resale shop
- Office work assistance

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

FirstHealth of the Carolinas, a not-for-profit health system, was created out of a philanthropic drive in the community to bring better health care to the region in 1929. In turn, the organization has been deeply rooted in the community to provide not only charity care in terms of treatment, but also needed philanthropic support as necessary. This philanthropic relationship is highlighted by its relationship with the United Way. The United Way campaign is the only corporate-wide campaign supported by the organization. FirstHealth of the Carolinas makes up approximately 25-30% of the annual county campaign for the United Way of Moore County, which is where the corporate office is located. Funding from the campaign also goes to support local charities in the counties where FirstHealth has a hospital including Richmond County (United Way of Richmond County), Hoke County (Hoke United Fund), and Montgomery County (Montgomery Crisis Fund). There is no United Way organization in either Hoke or Montgomery County.

For the fifth year in a row, the 2015 campaign included FirstHealth employee participation in the United Way Day of Caring. Employees who participated in the United Way’s Day of Caring worked directly with various agencies and learned about agency activities. As noted in Standard 1, eight employees participated in the Day of Caring events in UW programs for 44 volunteer hours. These volunteers were paid by FirstHealth at their regular hourly rate as educational time and participated with the agencies directly through a variety of activities.

To promote ongoing support for community involvement and volunteerism, FirstHealth matches each two hours of volunteer time for an approved activity with one hour of paid-time-off (PTO). This program is referenced in Standard 1. When new employees are hired, they are required to attend a two-day corporate orientation, during orientation a speaker from the FirstHealth Community Health Services conducts a presentation including information about FirstHealth’s community benefit program and the PTO Match incentive that FirstHealth provides to employees who volunteer their time and work in the community. Additionally, the employees learn of the FirstHealth commitment to the community in the areas of health and wellness and commitment to the United Way. The session ends with a video that was filmed in the community highlighting FirstHealth employees and their work in the community. This video can be accessed at <https://www.firsthealth.org/about>.

Finally, there is corporate representation on the United Way of Moore County Board of Directors to ensure a year-round relationship and support of philanthropic activities in the community.

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

Though community benefit has been part of our organization since its doors opened in 1929, the CEO of FirstHealth worked with FirstHealth Community Health Services in 2001 to establish a formalized community benefit program to define and coordinate existing services and develop new services for the communities, which the institutions of FirstHealth serve. In addition to the continuation of traditional benefits such as provision of essential hospital services at no cost to the indigent patient, a comprehensive community benefit program also responds to community needs, as well as represents good business practice. Participation in the United Way Campaign is a critical piece of the puzzle that the organization can foster the spirit of giving throughout the organization. In fact, FirstHealth of the Carolinas is one of two organizations in the county that serve as a corporate sponsor of the United Way of Moore County.

Additional corporate leadership activities included:

- Intranet FirstHealth United Way webpage including a “message from the CEO” video;
- FirstHealth’s CEO, along with our vice president of human resources appropriated a \$10,000 budget to campaign expenses;
- For the United Way of Moore County Board, the Administrative Director of Community Health Services serves as Treasurer for the Board. Additionally, he serves on the Review/Allocation Committee of the United Way of Moore County;
- The FirstHealth’s United Way Campaign Chairperson serves on the Review and Allocations Committee for the United Way of Moore County; and
- Corporate officers lead the way through participation in various United Way activities and promotion through departments and where appropriate participate in other United Way efforts in FirstHealth covered counties where there is a United Way agency, specifically Richmond County.

See below for needed data

Year	Total Number of Givers	Number of Leadership Givers	% of Leadership Givers	Percent Change
2015	2170	47	2.2 %	-15 %
2014	2413	55	2.3 %	44 %
2013	2530	38		

Local corporate numbers are reported below unless indicated as statewide

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.

1. Corporate management is included in every aspect of the campaign from the campaign chair through the departmental supervisor level. In addition, the organization allotted work time for more than 150 individuals to plan, organize and conduct the campaign, provided supplies and materials to publicize and promote the campaign, provided Public Relations department professional assistance and provided the financial resources for the campaign and the prizes awarded. Management held departmental meetings educating employees of the importance of the campaign contributions and many spoke one-on-one with employees to gain commitment.
2. The FirstHealth Administration allocated a \$10,000 budget to the corporate UW campaign committee to use for various supplies, events, marketing and prizes.
3. The FirstHealth organization supports the Moore County UW through a corporate sponsorship gift each year (\$12,514 in 2015). The majority goes to support the 2-1-1 referral service. In addition, the total gift of this year's FirstHealth employee campaign is 25-30% of the total campaign goal for the Moore County United Way. The Richmond County employee campaign contributed approximately 10% of the Richmond UW goal. Because the system has employees who live in multiple counties, employees are provided the option to direct their donation to the United Way of their choosing. Funds were donated to agencies in 15 counties.
4. The annual UW campaign is the only financial assistance solicitation FirstHealth endorses for its entire employee workforce other than those for the FirstHealth Foundation itself. The importance of giving back to the community is stressed through FirstHealth's commitment to community service and in its recognition of employee efforts as a part of the performance evaluation program.
5. FirstHealth sponsors and employees participate in American Red Cross blood drives at all three hospitals and the Health & Fitness center, pregnancy fairs, community celebrations, community health fairs, educational programs, employee fitness days at local businesses, National Cancer Survivors day event, NICU reunion, and many other events associated with United Way or its partner agencies.
6. Through a partnership with Montgomery County \Schools, FirstHealth operates two school-based health centers advocating health and wellness for all students in the school system. FirstHealth's three Dental Care Centers provide dental care to Medicaid-eligible children in Moore, Hoke and Montgomery counties. Children assisted by these programs are part of the population assisted by United Way.
7. FirstHealth provides a speakers bureau to provide no cost educational programs to various community, church and civic groups, which include United Way agencies

Year	Corporate Gift	Percent Change
2015	\$12,514	25.1%
2014	\$10,000	0%
2013	\$10,000	

Local corporate numbers are reported below unless indicated as statewide

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

Campaign kick-off events were held at each of the four FirstHealth hospitals for the departmental team captains to pick up pledge cards for their departments, receive education about the United Way and the campaign logistics. Departmental captains were also informed that they had the freedom to design department-specific events, contests, raffles or fun-filled activities to enhance the overall corporate campaign. Using departmental captains is very important since the organization covers such a large geographic territory. Additionally a corporate campaign database allows our departmental captains electronic pledge card entry in a seamless manner without losing the high-touch benefit of handing out a physical pledge card to each employee. This system also provides clear goals for each of the captains, by automatically calculating their total pledges versus their individual goal. Their goals this year were to exceed both the participation goal of the organization overall (54%) AND to increase overall donations in their areas of responsibility by 2%.

Departments responded with breakfasts, lunches or snack breaks as they distributed pledge cards and informed staff of the campaign. Others held meetings for managers to stress importance of giving in the community. FirstHealth makes it easy for employees to donate to the United Way campaign by allowing donations of PTO, cash or payroll deduction. Employees can designate to the county program of their choice or to specific non-profit agencies and, for many employees, being educated about this option made the choice to give simple.

An Intranet FirstHealth United Way webpage keeps the entire organization updated on information about the supported agencies, campaign progress, corporate campaign contest winners tied to campaign activities, and our CEO message. All prize winners were published on the organization's electronic bulletin board on our United Way web page and in the employee newsletter. Additional recognition of donors and prize winners and race toward the goal at each of the hospitals was promoted through a specially-developed web page for the corporation's intranet. This page was kept up to date with total donations and percent toward goal as well as ongoing prize and competition winners. Electronic notices were sent out as the web page was updated. This year's theme was "Back to the Future" encouraging employees to harken back to their 80s days with pictures, music, and stars of the time. We even got to relive our arcade glory days with Pac Man and Galaga.

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*

First Health employees continue to respond to donate for the support of local needs. One of the goals of the Campaign Committee was to increase per capita giving among FirstHealth employees. Enthusiasm generated during the campaign by the prizes, the education on the partner agencies, and communication about the progress toward the goal is a key to success. The use of 125 departmental captains across the organization helps to infuse enthusiasm by generating one-on-one contact and pushing to meet campaign deadlines.

The 2015 campaign matched our all-time campaign high achieved in 2014. It is a significant accomplishment and also provides an opportunity to look for new ways to see how the organization can find a new plateau.

Please note below that the employee number listed below is the total number of "employees" and not "full-time employees."

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	\$200,000	0%	4706	\$42.50	-2.9 %
2014	\$200,000	3.6%	4568	\$43.78	5.9 %
2013	\$192,972.84			\$41.33	

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***

FirstHealth asks that each captain collect all pledge cards regardless of whether the employee contributes to the campaign or not. That way we can verify that everyone at least received their card and the communication associated with the distribution of the cards. Each year we make a presentation to the leadership team of the hospital asking them to select a dynamic and well-respected employee from each of department (larger departments may have more than one) to be their team captain. Once captain selections have been verified, we hold a kick off meeting with those captains to share presentations from the local agency representatives, review prior year successes and lessons learned, and to review goals for the current year.

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	4706	3%	2170	-10%	46.1%
2014	4568	-2.1%	2413	-4.6%	52.8%
2013	4669		2530		54.1%

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