



### 2019 Spirit of North Carolina Application

Organization Name			
Street Address		City/St:	Zip
United Way Name		Metro Size:	
Application Contact	Name:	Email:	

Organization – Employee Size	Type of Organization
_____ Up to 25 Employees	_____ Financial/Banking Institutions
_____ 26-50 Employees	_____ Manufacturing
_____ 51-100 Employees	_____ Business Campaign
_____ 101-200 Employees	_____ City/County Municipality
_____ 201-300 Employees	_____ Higher Education
_____ 301-500 Employees	_____ Hospital/Health System
_____ 501-750 Employees	_____ Retail
_____ 751-1000 Employees	_____ Not-for-Profit – 501(c)3
_____ 1001-1500 Employees	_____ Professional Services (small business, partnerships, LLC, accounting, architect, engineering firm, physician practices, attorneys, etc.)
_____ 1501-2000 Employees	_____ Gated Communities, or other unique groups
_____ 2001-2500 Employees	
_____ 2501-3500 Employees	
_____ 3501-4000+ Employees	

#### Standards of Excellence Checklist

<input type="checkbox"/>	1.	Community engagement and volunteer culture – <b>OUTSIDE OF UW RELATIONSHIP</b> <i>Up to 5 Points</i>
<input type="checkbox"/>	2.	Partnership <b>WITH UW</b> to raise community awareness of needs & foster a spirit of giving <i>Up to 5 Points</i>
<input type="checkbox"/>	3.	CEO, Senior, and General Leadership Involvement and Giving <i>Up to 10 Points</i>
<input type="checkbox"/>	4.	Corporate or Foundation Contributions & Other Non-traditional and In-kind Gifts <i>Up to 5 Points</i>
<input type="checkbox"/>	5.	Employee Campaign Coordination, Recognition and Incentive <i>Up to 5 Points</i>
<input type="checkbox"/>	6.	Participation Level <i>Up to 10 Points</i>
<input type="checkbox"/>	7.	Special Events <i>Up to 10 Points</i>

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

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

## Organization Overview

If selected as a Spirit Winner, comments will be made during the Awards Ceremony which highlight your organization's culture and creative strategies that led to increased community engagement, impact and resources.

Briefly describe the philanthropic culture of the organization.

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

Three NUMERICAL successes you wish to highlight:

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**Standard 1 – Up to 5 Points**

**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.**

**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?

**Standard 2 – Up to 5 Points**

**Organization's partnership *WITH UNITED WAY* to raise community awareness of needs and foster a spirit of giving.**

- 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.

**Standard 3 – Total Possible Points = 10**

**Up to 5 points for description and specific event details**

**Up to 5 points for increase in % of leadership giving or consistent/stable giving by leadership**

**CEO/Sr. Leadership & General Leadership Involvement & Giving**

- 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:**

**Complete the chart below. Up to 5 Points**

*2.5 points awarded for any positive % change in number of leadership givers.*

*First, determine % of leadership givers for 2019 = # of leadership givers in 2019 divided by 2019 total # of givers*

*Compare 2019% to 2018% and record % change in # of Leadership Givers*

*Any positive change in % of leadership givers is awarded 2.5 points.*

*An additional 2.5 points is awarded for 10% or greater increase in % change of leadership givers.*

*Judge’s discretion - Points awarded for consistent leadership giving for companies less than 100 employees- 2.5 points*

Year	Total # of Givers	# of Leadership Givers	% of Leadership Givers	% Change in # of Leadership Givers	Pts Awarded for positive % change	Pts Awarded 10% increase or greater	Pts Awarded Judge’s Discretion	Total Points
2019								
2018								

**Provide comments regarding small companies (less than 100 employees) who have no change in % of Leadership Givers**

**Standard 4 – Up to 5 Points**

**Corporate or Foundation Contributions and Non-traditional/In-kind Support**

- 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.*

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Year	Corporate Gift
2019	\$

**Standard 5 – Up to 5 Points**

**Employee campaign coordination, recognition, and incentive**

- 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

**Standard 6 –Total Possible Points = 10**

**Up to 5 points for description**

**5 points awarded for growth in number of givers**

**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, etc.**

**Up to 5 Points**

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

**5 Points Awarded for any increase in % participation, 2.5 Points Awarded for Stable Participation Level**

**First, calculate % Participation for 2019 and 2018 -  $\% \text{ Participation} = \# \text{ of givers divided by } \# \text{ of employees}$**

**Record any positive Change in % Participation -  $2019 \% \text{ participation minus } 2018 \% \text{ participation}$**

Year	Total # of Givers	Total # of Employees	% Participation	% Increase Participation 2019 over 2018	5 pts awarded for any increase in % participation	2.5 pts awarded if Participation Level remained flat 2019 over 2018
2019						
2018						



## Standard 7 – Up to 10 Points

### Special Event

- 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)