Company/Organization Name: Smith Leonard PLLC

Address: 4035 Premier Drive #300
City/State: High Point, NC
Zip: 27265

Name of Person Completing this Application: Kelly York
Phone: 336-883-0181
E-mail: kyork@smithleonardcpas.com

Name of Sponsoring United Way: United Way of Greater High Point
Metro Size: II

United Way Contact for Questions: Gart Evans
Phone: 336-899-0882
E-mail: gart.evans@unitedwayhp.org

Does the company know a Spirit Application has been submitted on their behalf? X Yes □ 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

1. Volunteer Culture
2. Partnership with Community
3. CEO/Senior Leadership and Involvement and Giving
4. Corporate or Foundation Contributions & Other Non-traditional and In-kind Gifts
5. Employee Campaign Coordination, Incentive and Recognition
6. Overall Per Capita Gift
7. Participation Level

Heads up!
Please do not add pictures to the Standards Text Box. Instead, attach separate page with pictures labeling the corresponding Standard. (Attachment 1)

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.
### AWARD CATEGORIES

<table>
<thead>
<tr>
<th><strong>Organization</strong></th>
<th><strong>Type of Organization</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Size</strong></td>
<td>Check the appropriate box for this application submission.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Up to 50 employees</td>
<td>Financial/Banking Institutions</td>
</tr>
<tr>
<td>51 – 100 employees</td>
<td>Manufacturing</td>
</tr>
<tr>
<td>101 - 200 employees</td>
<td>Business Campaign</td>
</tr>
<tr>
<td>201 - 500 employees</td>
<td>City/ County Municipality</td>
</tr>
<tr>
<td>501 - 1000 employees</td>
<td>Higher Education</td>
</tr>
<tr>
<td>1001 - 1500 employees</td>
<td>School Campaigns</td>
</tr>
<tr>
<td>1501 - 2500 employees</td>
<td>Hospital/ Health System</td>
</tr>
<tr>
<td>2501 - 5000 employees</td>
<td>Retail</td>
</tr>
<tr>
<td>5001 + employees</td>
<td>Not-for-Profit Agency - 501(C)3</td>
</tr>
<tr>
<td></td>
<td>Professional Services <em>(small business, partnerships, LLC accounting, architect, engineering firm, attorneys, etc.)</em></td>
</tr>
</tbody>
</table>

+ 

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:**

Bobby Smith, CEO

_____________________________

**Email:**

bobby.smith@unitedwayhp.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:**

Smith Leonard is a CPA firm that believes our core competency lies in the way we take care of our employees and our community. By creating a unique culture and work environment, we believe our engaged, happy employees will be empowered to go out to our clients and the community and give their best every day. We stand behind and live out our core values of ARE – Access, Relationships, and Experience. We ARE accessible. We ARE relational. We ARE experienced. We ARE Smith Leonard. These core values certainly apply both internally and externally, as well as to our service in the community.

We support and encourage employee involvement in the community, both from a financial standpoint as well as through physical participation. Our team members feel empowered to go out and serve the causes that are near to their heart. Our office closes for an annual “day of service” where we deployed our 50 team members this year to 6 various causes, including painting a boys and girls club, packing backpacks for our local food-insecure children, and volunteering at 2 local animal shelters. Many of our team members volunteer regularly, but most also serve in leadership positions through various board memberships.

**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)

We decided this year to drive 100% participation for the campaign. Our community involvement committee wanted to offer a reward to the company for 100% participation that would motivate folks to get involved and encourage others who hadn’t contributed yet. We decided on custom embroidered LLBean fleece jackets with our Smith Leonard logo. Our younger team members chose this item and were very excited about getting them for the office. We made it clear that we would only order the jackets if we reached 100% office participation. To increase motivation, we ordered samples of the jackets so folks could actually see and feel the reward and try on their size. There was buzz about the jackets for several weeks before the campaign kicked off, which drove participation. We were thrilled that we were able to hit the 100% mark and have all received our jackets!

**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.)

- Leadership giving in 2015 increased to 8 people from 6 in 2014, and dollars increased significantly from $16,500 to $22,455.

- Our total campaign giving increased in 2015 to $33,512.40 from $23,551 in 2014.

- We raised an additional $900 via our first-ever employee fundraiser, which was in addition to the standard pledges. This was a fundraiser where employees paid to keep up or remove goofy pictures of co-workers.
**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*

We are fortunate to work for a company that encourages community service and leads with a “tone at the top.” Both Darlene Leonard and Ken Smith, our current and former managing partner, respectively, have a tremendous résumé of community involvement. Along with many other community positions, Darlene was Chair of the United Way of Greater High Point Board this past year, along with a concurrent role as Chair of the High Point Chamber of Commerce. Ken is currently the Pacesetter Chair for the High Point United Way and also has leadership positions in a variety of other organizations throughout High Point. Smith Leonard is not an organization that merely writes a check to get involved. If we are sponsoring an organization in any way, you will likely find that our team members are personally involved in attending events and taking on a leadership role. Our philanthropy and community service is varied, both in type and geography. We serve where we live and are proud to give back to the communities around the Piedmont Triad.

**Volunteer organizations include:** United Way of Greater High Point, High Point Chamber of Commerce, High Point Economic Development Corporation, Rotary Clubs, Kiwanis Clubs, National Conference for Community and Justice, Big Brothers Big Sisters of the Central Piedmont, Out of the Garden Project, Local YMCAs, Backpack Beginnings, Youth Focus, High Point Fire Department Relief Fund, High Point Regional Health Systems, High Point University, High Point Boys and Girls Club, Alcohol and Drug Services, Davidson County Economic Development Commission, Davidson Community College Foundation, Inc., Davidson Progress, various religious organizations, Triad Outreach Partners, Go Far, various booster clubs and school involvement, Guilford County Economic Development Corporation, Junior League

Sampling of specific activities in 2015 beyond board membership:

- Touring 3 United Way recipient organizations in advance of our campaign to increase awareness
- Packing food backpacks for food insecure children
- Painting a Boys & Girls Club
- Volunteering at local animal shelters
- Reading at schools and tutoring local children
- Sponsoring a local family at Christmas
- Serving meals at church
- Coaching local youth sports
- Fundraisers (Kiwanis Chicken Feed, Rotary Skeet Shoot, Rotary Raffle/Silent Auctions)

Our estimated number of annual volunteer hours across the organization:

<table>
<thead>
<tr>
<th># of Employees</th>
<th>Annual Volunteer Hours</th>
<th>Dollar Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>1800</td>
<td>$40,590</td>
</tr>
</tbody>
</table>
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 have a community involvement committee, which meets quarterly to determine various initiatives for our group to get involved corporately, beyond each of our individual volunteerism. Additionally, we have a sub-group of employees called SLA (Smith Leonard Ambassadors), which is comprised of our staff and senior level employees. They are our future, and while the group originally started to provide networking and soft skill development, this group has elected to alternate their monthly meetings with a community service project.

Some of our involvement includes:

- Annual CANpaign Food Drive collection location, with 2015 being our top year of collections ever – a 45% increase in giving over the prior year. We track audit vs. tax departments to drive participation. We donated 2,006 items.
- SLA toured 3 United Way of High Point recipient organizations in August to showcase what the UWHP does locally in our community.
- Our November 4th United Way kick off included a half day off of team building, which included a food truck and tailgate-themed games. Additionally, we had a “minute to win it” competition between our SLA group and management. A trophy was given to the winner, and we look forward to this being an annual event.
- We also had a wrap-up meeting for our campaign on November 13 where Smith Leonard bought lunch for our entire group via Ken Smith’s Kiwanis Club’s Chicken Feed fundraiser. So in celebrating our United Way victory, we also supported another local cause.
- SLA adopted a family at Christmas and raised over $500 to provide 2 boys with presents and needed items like coats, clothes, and shoes.
- We sponsor a table at local chamber and United Way luncheons, which provides 8-10 of our employees with exposure to resources in the community.
- Our September 18 Day of Service deployed all 50 of our employees across the community to volunteer in groups of 10 or less. We were able to connect with several organizations and utilized social media (Smith Leonard Instagram and NCACPA’s Instagram) to promote our involvement.
- We host a Bike MS rest stop every year during the Tour de Tanglewood and often encourage our internship candidates to get involved with our team as a first exposure during recruiting season.

We are proud of our unique culture and have started using the hashtag “#onlyatsmithleonard” to highlight our activities in the community and showcase that we feel that we are a unique firm, with philanthropy being a key differentiator. These pictures can be found on our Instagram page: https://www.instagram.com/smithleonardpllc/
**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.

8 of our employees give at the leadership level. 2 of those leaders are heavily involved in United Way specifically, among other community endeavors. Both of those leaders gave compelling speeches at our kickoff as to why they give of their time in addition to their money. Another leader is the head of the community involvement committee and led the campaign for 2015. She did all of the organizing and execution of the campaign.

Our volunteerism is very transparent. Our leaders speak of their involvement, announce events that these organizations are sponsoring, and invite others to attend meetings and luncheons that highlight those organizations.

Involvement includes:
- Table sponsorships for Big Brothers Big Sisters events as well as United Way and Chamber luncheons
- Myriad of local board memberships (see list above in Standard 1)
- Requests to participate in various Oyster Roasts, Raffles, Silent Auctions, Chicken Feeds, etc. that are sponsored through our local participation in the community and Rotary/Kiwanis organizations.

We also donate our conference room every month for the Boys and Girls Club board meetings, of which one of our managers is a member. This provides a monthly visible reminder of our commitment to volunteerism to all of our associates.

Our volunteerism is also noted on our calendars that are public to the entire organization. It’s a subtle reminder to all of us of the level at which our folks are involved.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Number of Givers</th>
<th>Number of Leadership Givers</th>
<th>% of Leadership Givers</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>45</td>
<td>8</td>
<td>18 %</td>
<td>6.6%</td>
</tr>
<tr>
<td>2014</td>
<td>30</td>
<td>6</td>
<td>20 %</td>
<td>- 0%</td>
</tr>
<tr>
<td>2013</td>
<td>29</td>
<td>6</td>
<td>21 %</td>
<td></td>
</tr>
</tbody>
</table>

*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.**

Our management team places high priority on the United Way Campaign. As previously stated in Standard 1, two of our top leaders (the “Smith” and “Leonard” in Smith Leonard Accountants) have current leadership positions within the United Way organization. As such, they are not only motivating our employees, but all participating companies in the High Point area. Our leadership gives significantly, both from a personal and corporate giving standpoint.

Additionally, the time and monetary support put into this campaign was exceptional this year. Our entire office of 50 people was awarded a complimentary half day off for the kick-off campaign. They provided lunch, refreshments, and games for us to use as motivation for our team. Additionally, they provided custom logo jackets to all 50 of our team members once we hit the 100% participation goal. Our managing partner also donated her Myrtle Beach condo for a weekend as part of a drawing for caring gift participants.

One of the organizations featured in this year’s campaign video was one of our 6 locations where our folks volunteered on our September 18th day of service, which was also a complimentary paid day off for our staff of 50.

<table>
<thead>
<tr>
<th>Year</th>
<th>Corporate Gift</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>$3500</td>
<td>0%</td>
</tr>
<tr>
<td>2014</td>
<td>$3500</td>
<td>9.38%</td>
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<tr>
<td>2013</td>
<td>$3200</td>
<td></td>
</tr>
</tbody>
</table>

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

The campaign coordinator and the community involvement committee met several times over the course of a few months in preparation for this event. The coordinator allocated up to 25 hours of work time between meetings, preparations, and the actual event to execute this campaign, which is a dollar value of almost $1,500.

We were very deliberate in wanting to drive 100% participation and a significant giving increase over 2014. Additionally, awareness was a main objective, particularly for our younger folks with less exposure to all that United Way does in the community. Our August tour of the 3 organizations for our staff and seniors was a purposeful trip in advance of our campaign to drive awareness and understanding for the impact of giving.

Employees were recognized at planning meetings, in our management group meetings, and then both at the campaign kickoff and wrap-up.

We also awarded a trophy to the winning side as part of our management vs. staff minute-to-win-it games during the kickoff day. We all feel like winners as well and are constantly reminded of our participation in the campaign when we wear our jackets.

Again, a summary of incentives:

- ½ day off for the kickoff
- Allowed to wear jeans and favorite tailgate-themed sports shirt/jersey on kickoff day
- Food and drinks provided that day, including a local food truck
- LLBean Fleece Jackets (value approx. $100 each) for our staff of 50 given 100% campaign participation
- A weekend prize at Myrtle Beach for 1 fair share participant
- Free lunch and ice cream the day of the campaign wrap-up
- Snack breaks (including cotton candy) to keep folks motivated and reminded of our tailgate campaign theme
- Two $25 gift cards were used in a drawing on day 1 for those who turned their pledge forms in the same day as the kickoff
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**

The biggest difference this year in our campaign was organization, leadership, and awareness. Typical campaigns in year’s past have been limited due to the timing for pacesetters and the conflict with several of our major tax deadlines. As a result, campaigns only included a quick kick off meeting in the morning and a gift card drawing for those fair share participants only who turned in pledge cards. We decided to delay our campaign this year to give ample time and attention to our fundraising efforts.

This year, the following were different:
- Our marketing director was placed in charge of the campaign
- She created a community involvement committee to get more organized for this and other initiatives
- There was more of a buzz leading up to the event, including the tour our staff and seniors took in August of recipient organizations
- We had the LLBean Fleece Jackets as a prize for 100% participation
- There were other incentives, including gift cards and a beach weekend giveaway
- We created a fun, memorable campaign, which also served as a great team building event. Those activities included:
  - A minute-to-win-it challenge competition between our management group and our staff/seniors.
  - A picture campaign where everyone had a goofy pic of themselves posted on their office door or cube. They could donate to have it taken down or others could out bid them to keep it up during the campaign.
  - The food truck, drinks, and fun tailgating games helped solidify our theme

Local corporate numbers are reported below unless indicated as □ statewide

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Employee Giving Amount</th>
<th>Percent Change</th>
<th>Total No. of Full-time Employees</th>
<th>Employee Per Capita</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>$33512.40</td>
<td>42.3%</td>
<td>45</td>
<td>$744.72</td>
<td>10.7%</td>
</tr>
<tr>
<td>2014</td>
<td>$23551.00</td>
<td>9.9%</td>
<td>35</td>
<td>$672.89</td>
<td>6.8%</td>
</tr>
<tr>
<td>2013</td>
<td>$21431.08</td>
<td></td>
<td>34</td>
<td>$630.34</td>
<td></td>
</tr>
</tbody>
</table>

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*

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Number of Employees</th>
<th>Percent Change</th>
<th>Total Number of Givers</th>
<th>Percent Change</th>
<th>Percent Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>45</td>
<td>28.6%</td>
<td>45</td>
<td>50%</td>
<td>100%</td>
</tr>
<tr>
<td>2014</td>
<td>35</td>
<td>2.9%</td>
<td>30</td>
<td>3.4%</td>
<td>85.7%</td>
</tr>
<tr>
<td>2013</td>
<td>34</td>
<td></td>
<td>29</td>
<td></td>
<td>85.3%</td>
</tr>
</tbody>
</table>

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

We were all provided the day off from work responsibilities to learn about all United Way does in our community. Each person was given a pledge form on kickoff and had 10 days to complete their pledge. Several of our team members are also on boards for various United Way organizations and are provided time off from work to attend these meetings or volunteer.

New hires are allowed to pledge immediately to begin their payroll deduction with the first paycheck. We provide information forms on the United Way at that time.

We have a very limited number of retirees, as Smith Leonard in its current form has only been around since 2007. This will be a project for future consideration as our leaders begin to retire.