STANDARDS OF EXCELLENCE
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. Overall Organizational Volunteer Culture
2. Raising Community Awareness of Needs and Foster a Spirit of Giving
3. CEO, Senior, and General Leadership Involvement and Giving
4. Corporate or Foundation Contributions & Other Non-traditional and In-kind Gifts
5. Employee Campaign Coordination, Recognition and Incentive
6. Overall Per Capita Gift
7. Participation Level

You may submit video links or DVD for viewing by the Selection Committee. Submit DVDs to Anita Barker, 875 Walnut Street, Suite 150B, Cary, NC 27511.
### AWARD CATEGORIES

<table>
<thead>
<tr>
<th>Organization Employee Size</th>
<th>Type of Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check the appropriate box for this application submission.</td>
<td>Check the appropriate box for this application submission.</td>
</tr>
<tr>
<td>□ Up to 25 employees</td>
<td>□ Financial/Banking Institutions</td>
</tr>
<tr>
<td>□ 26-50 employees</td>
<td>□ Manufacturing</td>
</tr>
<tr>
<td>□ 51-100 employees</td>
<td>□ Business Campaign</td>
</tr>
<tr>
<td>□ 101-200 employees</td>
<td>□ City/County Municipality</td>
</tr>
<tr>
<td>□ 201-500 employees</td>
<td>□ Higher Education</td>
</tr>
<tr>
<td>□ 501-1000 employees</td>
<td>□ School Campaigns</td>
</tr>
<tr>
<td>□ 1001-1500 employees</td>
<td>□ Hospital/Health System</td>
</tr>
<tr>
<td>□ 1501-2500 employees</td>
<td>□ Retail</td>
</tr>
<tr>
<td>□ 2501-5000 employees</td>
<td>□ Not-for-Profit Agency - 501(C)3</td>
</tr>
<tr>
<td>□ 5001+ employees</td>
<td>□ Professional Services (small business, partnerships, LLC accounting, architect, engineering firm, attorneys, etc.)</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

**Printed Name**

______________________________

**Signature**

______________________________

Bobby.smith@unitedwayhp.org

**Email**
Organizational Overview

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

Describe the philanthropic culture of the organization:

**Purpose:** We exist to provide the best vehicle that safely transports our children to and from school. The product, services, and performance must be at the highest standards due to the importance of our riders.

**Clearly envisioned future:** Premier product in pupil transportation. We are sought after by school districts and contractors. Our bus is full of technology that makes the product, production, and safety features truly premier. We service premier and hungry customers. We are a collaborative group, selfless decision makers that focus on performance, customer features, and creating results as partners… breaking preconceived department boundaries and dealer boundaries. Parents want their children riding our bus. We are recognized as the safest, world class, MB of buses. We have a close knit culture at work that supports our convictions. We follow discipline and standardized processes.

**Convictions:** Positive, Purposeful, Fun, Family, Honesty, Respect, Teamwork, **Responsible**, Hard work and disciplined

**Philanthropic Culture:** At Thomas Built Buses, we state and live by our convictions. One of the convictions defined, explained, and lived at Thomas is responsible. Responsible: We know that our actions at work have consequences. We will be mindful of these consequences. Our actions will be aligned with intent to drive improvements for our coworkers, shareholders, customers,** community,** and environment. We recognize and respect our employees’ needs and ability to give. We also recognize that many of us have been blessed with more than others in our community. As such, to be responsible, we will create opportunities for our company and our employees to give back.

Describe a successful strategy, engagement opportunity, or volunteer activity that ignited campaign success: moving the community to invest, volunteer, or advocate and create lasting impact.

This year, as opposed to simply announcing the campaign in town halls and electronic communications, we mobilized a group of both hourly and salary employees to act as constant touchpoints within the Thomas Built Buses organization. We mobilized a group of people who are not only passionate about giving and the United Way, but have in fact been direct beneficiaries of various United Way agencies throughout their lives.

The goal for this group (as well as executive staff) was to walk the floor in Live United shirts and to act as constant reminders that we are holding the campaign. Not only did they walk around and ask individuals if they know about the effort and the value of United Way, but they also did presentations in various team huddles throughout the campaign.

In addition to this effort, we also offered significant incentives and an interdepartmental competition with prizes for the departments who had the highest participation rate.

The goal was certainly a lofty one from a TBB perspective. We do and ask a lot throughout the year for our community who has given so much back to us. Our goal was $140K from the employees with a one for one match from Thomas Built Buses. We in fact surpassed that goal, to $150K with a total of a $300K donation to the United Way to be used throughout our community.

List 3 bullet-points highlighting numeric campaign success:

- Employees pledged a total of $150,508 with 31 employees giving at the leadership level.
- Employee pledges increased 107% over 2015
- Thomas Built Buses will match employee contributions dollar for dollar, resulting in total donations of $301,016
Standard 1 – Overall volunteer culture of the organization (this includes work with other community stakeholders, if applicable, as well as United Way).

- Describe how the organization works in collaboration with the community to solve problems.
- Does the organization have a social responsibility policy or statement?
  - If so, provide some highlights of the mission.
- Is the organization seen as a philanthropic leader and why?
- How does the organization benefit from being involved in serving the community?
- What % of employees are engaged in volunteer work? Does the organization have a volunteer policy?

**Up to 5 points**

<table>
<thead>
<tr>
<th>Thomas Built Buses’ employees exemplify a very high volunteer culture by participating in the following and taking our lead from the top down:</th>
</tr>
</thead>
<tbody>
<tr>
<td>* 2 members of the executive management team serve on the boards of United Way and Salvation Army</td>
</tr>
<tr>
<td>* Annual American Red Cross blood drives onsite</td>
</tr>
<tr>
<td>* Salvation Army’s</td>
</tr>
<tr>
<td>- Kettle Bell ringing</td>
</tr>
<tr>
<td>- Stuff the Bus (1300pds of school supplies raised)</td>
</tr>
<tr>
<td>- $1000 donation to Kickball Classic</td>
</tr>
<tr>
<td>* United Way CANpaign: 6000 cans raised</td>
</tr>
<tr>
<td>* Oak Hill Elementary:</td>
</tr>
<tr>
<td>- 20 volunteers/one hour per week for the reading buddies program</td>
</tr>
<tr>
<td>- 25 volunteers for end of year carnival and basketball program</td>
</tr>
<tr>
<td>- Donation total of $7000 to support school activities</td>
</tr>
<tr>
<td>- STEM Program (Science, Technology, Engineering and Mathematics) at local High Point Schools</td>
</tr>
<tr>
<td>- Bike drive for 274 students to receive bicycles for the holidays</td>
</tr>
<tr>
<td>* Flood relief efforts for eastern NC victims of Hurricane Matthew $4500 in goods, water and monetary donations</td>
</tr>
<tr>
<td>* Military Care packages sent to 200 members of the various divisions</td>
</tr>
<tr>
<td>* Water collection: Filled two buses with water being delivered to Flint, Michigan &amp; additional money was sent for a filtration system to St Pious Catholic School</td>
</tr>
<tr>
<td>* Over $1000 donated to Hospice, Senior Resources of Guilford County and United Way from employees on Employee Appreciation Day</td>
</tr>
<tr>
<td>* Thomas was the Corporate Sponsor of JDRF (Diabetes) High Point walk in April and $14,000 was raised</td>
</tr>
<tr>
<td>* Open Door Ministries Golf benefit, raised $5000</td>
</tr>
<tr>
<td>* Donated $1000 to Make a Wish Nebraska truck center annual benefit</td>
</tr>
<tr>
<td>* Habitat for Humanity Built 100th home in High Point</td>
</tr>
<tr>
<td>* Technology for our Future Laptops for Oak Hill children donated $1000</td>
</tr>
<tr>
<td>* ALZNC Alzheimers of NC walk at company picnic $5000 raised</td>
</tr>
<tr>
<td>* Heal our Heroes HP Benefit for veterans donated $1,000</td>
</tr>
</tbody>
</table>
Standard 2 – Organization’s partnership with United Way to raise community awareness of needs and foster a spirit of giving.

- Document ways in which the organization worked with United Way to generate enthusiasm for community involvement and support.
  - Specific rallies, events or programs
  - Unique awareness activities such as meetings, tours, speakers, and fairs.
- Comment on year-round engagement that exists, if applicable.

**Up to 5 points**

Throughout the course of the year, we review our need to give, and various programs to help out the community:

- General community support topics shared monthly in Executive Staff Meetings
- Utilize monthly salary staff town halls to highlight various community projects and needs, as well as reinforce our convictions and need to be responsible.
- Publish emails to all employees providing updates on our giving campaigns
- Creation of friendly competition between departments regarding giving amounts or volunteer time
- Bell ringers at Christmas for the Salvation Army

The 2016 campaign was championed by a community outreach committee selected from a group of volunteers from both salaried and hourly paid employees. The campaign started with a series of town hall meetings (all employees) where speakers included representatives from the United Way and United Way Agencies as well as our corporate leadership. Each of the speakers stressed the impact of the United Way in our community and how each of us contributed to that goal.

Specific events:
- Brainstorming management session to raise the target goal, create incentives, and show the need to give.
- 5 kick-off meetings in one day starting at 5:00 am and ending at 5:00 pm to reach 1903 employees.
- An employee shared a personal story of how a United Way partner agency is helping a family member.
- Invited representatives from United Way and its partner agencies, The Salvation Army and Open Door Ministries, to speak to our employees during our kick-off meetings.
- Shared with our employees a comparison of our 2014 campaign results to the results of Mickey Truck Bodies and other local companies to ignite some friendly competition, to beat those organizations during our campaign in 2016.
- Raffled off a wide variety of prizes
- Provided pre-printed donation cards to make it easier for employees to complete.
- Discussed campaign goals in leadership team staff meetings
- Discussed TBB’s conviction of Responsibility at town hall meeting
Standard 3 - CEO/Senior Leadership and General Leadership Involvement & Giving

- Describe the role that senior leadership plays in “influencing” philanthropy, community support, and campaign activities
- How does the organization’s leadership in general promote a culture of giving?
- List any specific events that are directed by the leadership team.

Up to 5 points

- Between the Leadership team and our employee population, 31 employees are giving at the “leadership level”. This level of leadership giving represents a percentage increase over last year’s level of 107%. We had 218 or 36% of our contributors at the Caring Gift level
- Multiple members of the Leadership team serve as volunteers at Oak Hill Reading Buddies
- Two members of the Leadership team are board members at the United Way and Salvation Army
- As a company we learn from example and that starts at the top for us, our President is very passionate about helping our community. He sends out emails encouraging giving and volunteerism and is the first one to roll up his sleeves to help.
- Our President will serve as the incoming Board Chair for United Way of Greater High Point

Complete the chart below. Up to 5 points

Any positive % change in leadership givers is awarded 2.5 points.
10% or greater increase in % of leadership givers receives an additional 2.5 points
Use local corporate numbers if possible, otherwise indicate as ☐ statewide

<table>
<thead>
<tr>
<th>Year</th>
<th>Total # of Givers</th>
<th># of Leadership Givers</th>
<th>% of Leadership Givers</th>
<th>% Change in Leadership Givers</th>
<th>Points Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>610</td>
<td>31</td>
<td>5</td>
<td>107%</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>472</td>
<td>15</td>
<td>3.16%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

UW % of Leadership Givers - 2016 # of leadership givers divided by the 2016 total # of givers
UW Leadership Givers % Change - 2016 # of leadership givers minus the 2015 # of leadership givers divided by 2015 #

Outline any factors or information that could affect % of leadership givers.
**Standard 4 - Corporate or Foundation Contributions and Non-traditional/In-kind 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.

*Up to 5 points. If your organization is Federal or Nonprofit and cannot legally provide a Corporate Gift, please provide information on in-kind gifts and other efforts below.*

- Corporate gift: the company matches dollar for dollar the employee pledges to the United Way. As a result of this campaign, Thomas Built Buses matched $150,508 with a total donation over $300,000

- President, Caley Edgerly, serves on the United Way Board of Directors

- Support of the United Way goes beyond Thomas Built Buses and up to our parent company, Daimler Trucks North America (DTNA). The President and CEO of DTNA annually send a message to all employees (including Thomas Built Buses) calling on us to extend our personal generosity to those who are less fortunate and asking us to consider United Way in our charitable giving plans.

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Corporate Gift</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>$150,508</td>
<td>+32 %</td>
</tr>
<tr>
<td>2015</td>
<td>$114,261</td>
<td></td>
</tr>
</tbody>
</table>

*Percentage change example: 2016 minus 2015 divided by 2015.*

*Use a plus or minus sign to show a positive or negative % change.*
Standard 5 – Employee campaign coordination, recognition and incentive

- Describe the work of the campaign coordinator and/or committee, listing successful planning tools, specific activities, and events 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

*Up to 5 points*

The community outreach committee spent more than an estimated 40 hours in preparation and execution of the campaign (initial meeting with United Way, campaign planning meetings, preparing town hall presentations, speaking at town halls, handing out pledge forms, tallying returned pledge cards, preparing for and conducting prize drawings).

The following were the incentives offered to our employees:

<table>
<thead>
<tr>
<th>Weekly Donation</th>
<th>Raffle Prize</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2</td>
<td>$50 gift card to local restaurant</td>
<td>30</td>
</tr>
<tr>
<td>$3</td>
<td>$100 gift card to local restaurant</td>
<td>15</td>
</tr>
<tr>
<td>$5</td>
<td>2017 Panthers Game package (4 Game tickets &amp; local gift card for dinner) est. value $400</td>
<td>2</td>
</tr>
<tr>
<td>$6</td>
<td>Great Wolf Lodge Get Away (2 Night stay and $100 gift card for dinner) est. value $600</td>
<td>1</td>
</tr>
</tbody>
</table>
| $10             | One week of vacation  
1. North Campus  
2. South Campus  
1. Office | 3        |

There was also a competition between departments by size. There were four winning departments and each employee within that department will receive a swag bag with a one of a kind sweatshirt that was made uniquely for this rally, it will also include a 100 year TBB hat and a small meal gift card.

In addition, if eligible:
- Employees were entered into the Vann York Car giveaway
- Employees received the United Way Caring Club Card
Standard 6 - Overall Per Capita Gift

- Describe events or strategic action that positively affected per capita employee giving
- Was a specific community issue at the center of employee giving? If so, explain.

Up to 5 points

- We set an “ambitious goal” and challenged ourselves to increase our total employee giving to the United Way to $150,000 which was a 31% increase.
- We held 5 town hall meetings over the span of 3 shifts
- We changed our incentives to spur greater participation and higher levels of giving
- We created a community outreach committee to spearhead the campaign

Local corporate numbers are reported below unless indicated as □ statewide

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Employee Giving Amount</th>
<th>% Change</th>
<th>Points Awarded</th>
<th>Total No. of Full-time Employees</th>
<th>Employee Per Capita</th>
<th>% Change</th>
<th>Points Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>$150,508</td>
<td>+32 %</td>
<td></td>
<td>1900</td>
<td>$79.21</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>$114,261</td>
<td></td>
<td></td>
<td>1573</td>
<td>$72.64</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Percentage change example: 2016 minus 2015 divided by 2015.
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.

2.5 Points are awarded for positive percent change in Total Employee Giving Amount 2.5
Points are awarded for positive percent change in Employee Per Capita Amount

Total possible points for Standard 6 = 10
Standard 7 – 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.

**Up to 5 points**

- Pre-print pledge cards for each employee, both hourly paid and salaried
- Hold town hall meetings with guest speakers and corporate leaders explaining the importance of employee giving and the impact of the contributions to the local community.
- Provide incentives to employees that contribute to the campaign. The value of the incentives increase with the increased level of employee contributions.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total # of Employees</th>
<th>% Change</th>
<th>Total Number of Givers</th>
<th>% Change</th>
<th>Points Awarded</th>
<th>% Participation</th>
<th>Points Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>1900</td>
<td>21 %</td>
<td>610</td>
<td>29 %</td>
<td></td>
<td>32 %</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>1573</td>
<td></td>
<td>472</td>
<td></td>
<td></td>
<td>30 %</td>
<td></td>
</tr>
</tbody>
</table>

*Employee % change = 2016 number of employees minus 2015 number of employees divided by 2015 number
Givers % Change = 2016 number of givers minus 2015 number of givers divided by the 2015 number*

2.5 Points are awarded for positive percent change in Number of Givers
2.5 Points are awarded for positive percent change in Percent of Participation Total possible points for Standard 7 = 10

Standard 1 Attachments
Habitat for Humanity

UW CANpaign
Oak Hill Elementary Bike Drive

JDRF High Point Walk
Hurricane Matthew Relief Effort

One of a kind sweatshirt for UW Department winners
Standard 2 Attachment

From: Edgerly, Caley (154)  
Sent: Friday, November 04, 2016 10:34 AM  
To: EC_OSQ, Exempt; And Office rec_G7S exempt-and-office@salimler.com>  
Subject: FW: United Way 2017 campaign drive

TBB Team,

Monday marked the “official” end of our 2017 United Way Campaign. I will never get tired of saying this; yet again the employees of TBB blew it out of the park.

Last year $125,000 was raised. This year, we are at $147,000 with a handful of pledge cards still rolling in. This is only $8k shy of $150,000, and $3k above the goal we set. Add in the company match, and nearly $600,000 will be going to our local community thanks to your generosity.

At this point, we would really love to collect $5K more to say we have hit a nice round number of $300K for the entire organization. We will of course take tardy pledge cards in coming days to hit this goal. If we can find 10 employees to consider $4 per week, we can hit this lofty stretch goal of $500K for the entire organization. If you are still on the fence about donating, keep in mind that our local United Way of Greater High Point gives .38 cents on every dollar back to our community.

Here are some other facts and tidbits from this year’s drive:

- 18% of your colleagues gave a Caring Gift. This equals $.6k of their yearly salary or 1hr of pay per month
- Caring gift members will be entered into the last 3 drawings of Vann York car give aways. Next semifinal car ticket drawing is on 11/7/16. Last drawing is on 11/21/16.
- 17% of your colleagues gave a Leadership Gift; this equals a donation over $1,000.
- Department participation winners will be announced on Thursday, 11/11/16.
- Drawings for prizes, based upon weekly amounts given will occur during the week of 11/14/16-11/18/16.

Whether your donation was $1 or $1,000, know that your community appreciates you giving back. There is still time. If you would like to make a donation please get your forms to your supervisors and/or Ellie Crump.

Proud of my coworkers,

Caley
Standard 4 Attachment

Youtube link to Why We Do This video

https://www.youtube.com/watch?v=pGjuzclirY