

2014 Spirit of North Carolina Campaigning for Excellence

Application Form <i>(www.unitedwaync.org)</i>			
Company/Organization Name	Enterprise Holdings		
Address	2860 Slater Road	City/State Morrisville, NC	Zip 27560
Name of Person Completing this Application	Kandra Gardner-Geoffroy	Phone 919-657-8969	E-mail kandra.j.gardner@ehi.com
Name of Sponsoring United Way	United Way of the Greater Triangle		Metro Size 1A
United Way Contact for Questions	Cassie Proper	Phone 919-463-5041	E-mail cproper@unitedwaytriangle.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 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: two new items!</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 20, 2015.</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 checked="" type="checkbox"/> 201 - 500 employees <input type="checkbox"/> 501 - 1000 employees <input type="checkbox"/> 1001 - 1500 employees <input type="checkbox"/> 1501 - 2500 employees <input type="checkbox"/> 2501 - 5000 employees <input type="checkbox"/> 5001 + employees	<input type="checkbox"/> Financial/Banking Institutions <input type="checkbox"/> Manufacturing <input checked="" type="checkbox"/> Business Campaign <input type="checkbox"/> City/ County Municipality <input type="checkbox"/> Higher Education <input type="checkbox"/> School Campaigns <input 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:

Mack Koonce



Email:

mkoonce@unitedwaytriangle.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:

Our company has a presence in thousands of communities, placing us on a first-name basis with the people who call those communities home. We purchase millions of dollars worth of vehicles locally, generate tax dollars through sales and employment, create meaningful jobs that generate significant income and benefits for employees and their families, and much more.

We realize we owe our success to the support and goodwill of the people who live in those communities and who do business with us. That's why we are committed to involving ourselves in the support of worthwhile endeavors wherever we operate our businesses, from local neighborhoods to the biggest cities and everywhere in between.

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)

This year's campaign was amplified and impacted heavily by our development of a Sub-Committee to represent each employee group and sector of our business. It was the work of these eight individuals and the Committee Chair which led to the success of this year's campaign. Having as many cheer leaders as possible in the game drove the performance of the entire team.

A "job description" was created for the role of the committee and prior to the beginning of campaign, they were trained by United Way so that they felt 100% comfortable in championing the cause.

The committee had many roles throughout the campaign including, but not limited to: Sub-Committee members will: educate and engage your peers and co-workers; identify (1) way to create an engaging family activity during the kickball event to increase United Way awareness and/or fundraise; choose a "decision to give matters" quote to represent their Area; solicit raffle items on behalf of the United Way Giving 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.)

- Total Employee Pledges in Dollars increased by 25% from the previous year
- Total number Pledges at United Way Leadership Level increased by 42%
- Total number of employee Pledges increased by 19%

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

HR Policy for Volunteering

The company encourages employee to donate up to 16 hours of time annually that may be administered during normal business hours. These hours are paid to the employee directly with the encouragement that the employee recruit and solicit other employees and business partners to join in the volunteer event.

Volunteer projects as a team encouraged by managers

Community Care Days are developed by individuals and/or groups to foster a team environment for giving back through volunteerism both during and outside of work hours. Example of these type of projects include both United Way partner agencies and other nonprofits in the Triangle Community. Some examples include: PLM Families Together- to clean their housing facilities, Race for the Cure Susan G Koman, Walk to Defeat ALS, and Canned Food Collection for distribution to local Food bank.

National Volunteer Week: April 6-12, 2014

This national movement is a celebration of volunteerism across our country. United Way's focus this week is on battling homelessness. From rebuilding homes to working in shelters, community members can roll up their sleeves and help. In 2014, United Way volunteers took part in 11 projects, touching over 50 homeless families in the Triangle. Fred Black, Kandra Gardner-Geoffroy and 10 team members volunteered with PLM Families Together where they cleaned the office and maintained the grounds at the temporary housing facilities (Enterprise was supposed to have 35 but agency had to cancel at last minute due to illness).

Collaboration across companies

While sitting at a United Way sponsored event early in 2014, Fred Black was inspired to help the community- especially hungry children. Coincidentally, he was seated with the Superintendent of Wake County Public Schools and the CEO of Syngenta, a biotech company in RTP whose mission is to feed the world. United Way helped to convene this group for an initial meeting and since, other partners have joined for monthly discussions about the implementation of school gardens.

Value of Volunteering

Event	HRS	EMPL	RATE	Total Dollars
PLM Families	4	10	22.55	\$ 902.00
Food Bank	4	16	22.55	\$ 1,443.20
Girls Scouts	8	1	22.55	\$ 180.40
Community Clean Up	8	1	22.55	\$ 180.40
				\$ 2,706.00

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

United Way Campaign Celebration

The United Way Celebration Event raised more than \$8,000.00 the evening of the event. The event was hosted by the sub-committee and included impact statement from Community Representatives and wrapped up with impact statement from employees and their personal experience with the United Way. The employees were moved and increased previous pledge dollars on the date of the event. Each subcommittee member and their team competed for bragging rights by donating a themed basket for raffle at the event, which not only fostered team giving, but also promoted partnerships with local business partners who donated items for the baskets (Angus Barn, GiGi's CupCakes, Wine & Design, The Carolina Hurricanes, Jimmy John's, The Cheesecake Factory, etc.).

Kickball Tournament

Enterprise's United Way campaign utilized the annual employee kickball tournament to invite business partners within the industry to increase their awareness of and to impact the United Way. Partners donated over \$1,000.00 directly to the campaign and co-branded signage at both the event and within their respective business to promote the spirit of giving in the community and across the industry. Employees also invited family and friends to participate. During the tournament there were interactive activities hosted by the sub-committee that highlighted United Way Impact Statements to increase awareness.

Campaign Committee Training

Enterprise's Relationship Manager and eCampaigns Manager held a training for the campaign committee. This included educating the group about United Way's evolving direction in community impact, upcoming events and logistics for campaign. 2014 was the first time in recent years that a training of this type was held and allowed the team to feel comfortable and have the resources needed in order to champion the cause.

Community Changers Forum In-Kind Donation and Participation

Community Changers Forums were developed by United Way of the Greater Triangle to bring together Campaign Leaders from across the Triangle to network, share best practices and learn about community needs. Enterprise Campaign Leaders have attended several forums. In August 2014, UWGT's forum was on wheels- a community impact tour to showcase the community impact. Enterprise donated three 15-passenger vans for the afternoon for UWGT to transport over 30 participants on the tour.

United Way Visibility at Rental Locations

Enterprise very visibly shows support for United Way and commitment to the community by hanging United Way posters and table toppers in the lobbies of rental car locations. This both reminds and encourages employees to participate and educates customers about the needs of the community and United Way's work.

Collaboration across companies

As mentioned in the last standard, a collaboration across companies to fight childhood hunger came about organically in early 2014. Currently, the collaboration is about sharing resources- intellectual capital and volunteer time- and making employees at these companies aware of the issue. This is an ongoing project that will engage Enterprise employees outside of the campaign in year round opportunities.

Standard 3 - CEO/Senior Leadership Involvement and 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.

Austin Peterson, (new) Regional Vice President

Austin was new to the Triangle at the end of 2013 and very active with United Ways in his previous location. United Way of the Greater Triangle wanted to provide him with an easy way to connect his passions to his new community- both through his personal financial contribution and his time and talent. Austin was very supportive of the campaign- allowing the e-pledge emails to come from his name and speaking at the celebration event. Austin also joined UWGT’s Tocqueville Step-Up Program which allows him to be a member of the Tocqueville Society through an increased gift over time.

Additional internal leadership levels

In addition to UW’s leadership level of \$1,000, Enterprise offers employees an additional opportunity to be recognized as a leadership donor internally. This number is based on their position and the annual gift amount varies. More than 50% of our total employees took advantage of this opportunity.

Targeted leadership solicitation

The Committee Leaders and Sub-Committee members targeted employees for Leadership Giving by promoting the Affinity Groups which exist at UWGT and the importance of leadership by example. The campaign provided special recognition for our leaderships level givers, not only through the United Way but on a corporate level as well. We also promoted an Elite 10 giving level- 10% increase over last year- to encourage employees who may have been very close to leadership level to give a little bit more

Affinity Groups

An upcoming goal in 2015 is to better link Enterprise’s internal employee groups with United Way’s Leadership Affinity Groups. This was briefly discussed in 2014 and because of the foundation we were able to build, will be a priority for 2015. This will allow employees to engage with United Way in a different, more individualized way based on their interests and help in the prospecting of new leadership level donors.

Year	Total Number of Givers	Number of Leadership Givers	% of Leadership Givers	Percent Change
2014	158	19	12 %	+ 72.7 %
2013	127	11	8.7 %	- 8.3 %
2012	167	12		

UW % of Leadership Givers - 2014 number of leadership givers divided by the 2014 total number of givers

UW Leadership Givers % Change - 2014 number of leadership givers minus the 2013 number of leadership givers divided by 2013 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.

United Way Match

Enterprise provides a very generous 50% match for employee contributions made during the campaign. In 2014, this amounted to an additional \$45,052.02 for our community. Enterprise’s corporate gift supports the Community Impact Fund, an investment in a comprehensive approach to basic needs and long-term solutions to create meaningful changes in the lives of families and children.

In-Kind Donation: Community Changers Forum on Wheels

Enterprise donated three 15-passenger vans for the afternoon for United Way’s Community Changers Forum on Wheels. This allowed transportation for over 30 Campaign Leaders from across the Triangle to learn more about the issues in our community. The market value of this in-kind donation was \$500.00:

“Join our traveling tour to see firsthand some of the issues facing our area, including food insecurity and homelessness and to learn about the partnerships and coalitions that United Way is developing to help solve these issues. These agency visits will inspire you and will help you develop your own connection to the collaborative work of UWGT. This tour is a must for all Campaign Leaders to better understand community issues.”

In Kind Donation: Weekend Convertible Rental

Enterprise’s generosity also extended to United Way of the Greater Triangle’s internal campaign. A weekend convertible rental is a great way to incentivize employees to make their pledge before the end of day 1! This definitely played a role as United Way’s internal campaign increased 21%. The market value of this in-kind donation was \$500.00.

Year	Corporate Gift	Percent Change
2014	\$45,052.02	+ 17.4%
2013	\$38,385.80	- 10.4%
2012	\$42,833.34	

Percentage change example: 2014 minus 2013 divided by 2013.

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

Role of the Committee Chair & Sub-Committee

In 2014 a Committee Chair and Sub-Committee were created in order to handle the strategy and day to day logistics of the campaign. This allowed a cohesive approach to spread the word and get everything done.

The Committee Chair will: assist in the coordination of special events; participate when possible in United Way sponsored events which promote increased engagement and awareness of employees; develop new and innovative ideas to present to the sub-committee for review and implementation within the region; maintain communication with the United Way Campaign Manager to ensure all resources available to the employees are presented; maintain open door policy to answer any questions or concerns regarding United Way giving from regional employees; communicate weekly via email to the Sub-Committee and Area Managers to ensure all parties involved in the promotion of the JTFV Public Affairs and Philanthropy Committee are aware of their current participation levels and financial contributions; provide meeting minutes to all subcommittee members, Human Resources and RVP

Sub-Committee members will: educate and engage your peers and co-workers in the process; identify (1) way to create an engaging family activity during the kickball event to increase United Way awareness and/or fundraise; each member to use the creativity of Cassie Proper if needed; choose a “decision to give matters” quote to represent their Area; promote and begin collecting items for your THEMED GIFT BASKET which will be raffled at the United Way Celebration Event on October 23rd 2014; solicit raffle items on behalf of the United Way Giving Campaign

Campaign Celebration- October 23, 2014

To wrap up the weeks of giving and celebrate our success, we hosted a celebration on October 23rd. This included impact statements from our community partners and coworkers and allowed us the opportunity for fellowship and fun. There was a ton of food and prizes were raffled. Also, an additional \$8,000 was raised at this event!

How were tickets distributed? What were some of the incentives?

Tickets for the Celebration Event were distributed on the evening of the event and employees had to be present to win. Employees were able to earn tickets for the following: Leadership Level Giving, Polo Level Giving, Early Bird Giving, Elite 10 Giving. We, through partnership with local business committed to the United Way goals, raffled off more than 30 items to employees which included: 50” Flat Screen TV, Boise Speaker, Roku Streamer, Spa Treatment, Gift Cards, ACC Basketball Tickets, Carolina Hurricanes Tickets, and Team Baskets.

Polo incentive

Employee who pledge at the Enterprise derived POLO Level of giving are permitted to wear their United Way Polo shirt on Paydays in celebration and honor of their giving back to the very communities we serve. The Polo has dual branded with EHI and the UNITED WAY logo for all of customers and business partners to see.

Internal announcement about the success of the campaign

Announcements regarding the total level of giving of and progress of reaching our goals were sent weekly. Likewise the final and overall success of the campaign was announced at both the Celebration event and then via email to all employees within the Region. This was our best campaign year ever on record.

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*

New! ePledge

One of the most significant factors in the increase of this year's campaign was moving to an epledge platform. This afforded many new opportunities including consistent messaging, non-respondent follow up emails, real time reporting, and targeted ask amounts. We were able to streamline the pledging process, making it easier for the donor and more effective and efficient for the Campaign Leaders. A paper campaign was also available for those without computer access.

More visibility for United Way

In the past few years, Enterprise has run a great campaign but hasn't given United Way representatives a lot of face time with employees. This year there were many more opportunities for employees to hear the message, straight from United Way: hosted team meetings at United Way offices, UWGT representation for school gardens initiative, CEO call with Austin Peterson, key account planning for year round engagement and campaign with UWGT Relationship Manager and ePledge Manager, committee training with UWGT, committee meeting with UWGT Campaign Chair (George Habel, Capitol Broadcasting), and end of campaign celebration with a special thank you from United Way.

Leadership

Enterprise's leadership team played a big part in the increased excitement and momentum around United Way this year. They were very visible throughout the campaign and were the champions of many of the United Way programs and messages. Austin Peterson, new Regional Vice President, joined United Way's Tocqueville Step-Up Program. Fred Black, Area Sales Manager, was the lead for the school gardens collaboration. Kandra Gardner-Geoffroy, Account Manager, led the United Way engagement strategy and committee. Yvette Bernhardt, Human Resources Manager led the e-campaign.

Committee

The sub-committee consisted of eight employees nominated by their direct managers as leaders and representatives for their team. More information about their role is provided in Standard 5.

Year	Total Employee Giving Amount	Percent Change	Total No. of Full-time Employees	Employee Per Capita	Percent Change
2014	\$91,014.04	+ 32.8%	304	\$299.39	+ 11.4 %
2013	\$68,510.00	- 19.6%	255	\$268.67	+ 18.3 %
2012	\$85,192.00		375	\$227.18	

Percentage change example: 2014 minus 2013 divided by 2013.

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. **Up to 10 points***

With a reduction of employees in 2013 accounting for less donors, strategies in 2014 allowed Enterprise to net 31 new donors, a 24% increase over last year! There were a few key forms of outreach that allowed employees an opportunity to support their community through the United Way campaign.

ePledge Campaign

New in 2014, Enterprise ran their campaign on an ePledge platform. This allowed Campaign Leaders to ensure that every employee knew that the campaign was happening. A kickoff email was sent out from Austin Peterson, Regional Vice President. Throughout the campaign, reminders were sent to employees that hadn't yet responded. Campaign Leaders were also provided with reports that showed current donation and participation totals, renewed and new donors and leadership givers. The ePledge platform was also highly customized for each employee to let them know their polo incentive giving amount and Enterprise leadership level, based on their position within the company. A paper campaign was available for those that were uncomfortable using the online platform or that didn't have access to a computer.

Committee

Sub-Committee members co-hosted the Regional Kick ball tournament and were responsible for the coordination of (1) special event with-in the 60 days leading up to the Employee Pledge Campaign. During the Employee Pledge Campaign each member was tasked with, through team work and peer involvement develop a themed basket for the Celebration event.

Incentives

Employees giving at the following levels (Leadership Level Giving, Polo Level Giving, Early Bird Giving, and Elite 10 Giving) earned incentives to win raffle items. We, through partnership with local business committed to the United Way goals, raffled off more than 30 items to employees which included: 50" Flat Screen TV, Boise Speaker, Roku Streamer, Spa Treatment, Gift Cards, ACC Basketball Tickets, Carolina Hurricanes Tickets, and Team Baskets.

Goal for 2015

Many of the 2014 strategies were about building up the campaign and gaining additional face time and momentum for United Way. In 2015, we hope to be very deliberate about year round engagement strategies that allow employees to learn about and see the impact they're having in the community. In addition to that, we're looking to find synergies between Enterprise's internal employee groups and UWGT's affinity groups.

Year	Total Number of Employees	Percent Change	Total Number of Givers	Percent Change	Percent Participation
2014	304	+ 19.2%	158	+ 24.4%	52.0%
2013	255	- 32%	127	- 23.9%	49.8%
2012	375		167		44.5%

Employee % change - 2014 number of employees minus 2013 number of employees divided by 2013 number
Givers % Change - 2014 number of givers minus 2013 number of givers divided by the 2013 number