



ECAP

City of Tucson Employee Combined Appeal Program



www.tucsonaz.gov/ecap



United Way of Tucson
and Southern Arizona

UnitedWayTucson.org

2016 Training Manual

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ECAP

City of Tucson Employee Combined Appeal Program

Letter from the President

Dear ECAP Representative,

I would like to thank you all for taking time from your busy work schedule to volunteer as an ECAP Representative. Without the support and hard work of all our ECAP Representatives we would not be able to raise funds to support those in need in our community.

Although we at the City of Tucson are dealing with some difficult financial times that affect our employees directly, it is encouraging to know that our City employees have the compassion to help their fellow citizens. With your assistance and the gracious contributions from our fellow co-workers ECAP raised \$168,578 last year. This money will help over 250 local charitable agencies assist those in with the greatest needs in our community.

This training manual will provide you with the information and resources that you will need to plan and carry out another successful campaign. Please read through the manual carefully as changes and updates have been made. On the back page of this training manual you will find a listing of all the ECAP Board members, please feel free to contact any one of us with any questions or concerns.

Thank you again for volunteering to be a key member of ECAPs success.

Sincerely,

Terry Lopez
President
2016 ECAP Board

ECAP

What is ECAP?

The **E**mployee **C**ombined **A**ppeal **P**rogram is the single solicitation effort at the work place which provides financial support for over 250 local agencies in Southern Arizona.

Contributing through **ECAP** is:

Easy

Cost effective

Assisting the community

Payroll deductible

ECAP

ECAP and United Way... a Partnership that Works!

As the Fiduciary, United Way performs a number of vital functions.

- After each City bi-weekly payroll, your deductions are sent by Payroll to United Way.
- United Way deposits the money into a separate fiduciary bank account. On a quarterly basis, United Way distributes 86.5% of your donation to the agencies.
- United Way confirms the status of an agency's 501(c)(3) status with the IRS. United Way also ensures that ECAP remains in compliance with the IRS.
- United Way maintains campaign contribution records and keeps all 501(c)(3) City of Tucson signed statements of non-discrimination, the US Patriot Act compliance forms and other required documents.
- United Way audits pledge forms and envelopes.
- United Way analyzes campaign results.
- United Way continually leverages funds to maximize the benefits for agencies.
- United Way helps ECAP through payroll deduction provide the best and easiest alternative for City employees to help the charity or agency of their choice.
- United Way assists the City in the professional design and printing of posters, pledge forms, envelopes, the agency directory, the representatives training manual, and other print materials that are necessary to make the campaign a success.

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ECAP Campaign Goals

BUILD

A caring community

INCREASE

Employee participation by 5%

INCREASE

Average contributions

INCREASE

The use of payroll deduction

PROVIDE

Presentations to educate employees about agency services available to them

ECAP

Your Role as Representative

You play a crucial role in the success of this campaign.

Duties include:

- Develop a campaign plan
- Run your campaign at the department/division level
- Distribute pledge forms and agency listings
- Make daily deposits of cash and check donations at one of the City cashier windows listed below:
 - **City Hall**
 - **Eastside City Hall**
 - **Hardesty Center**
 - **Park and Ajo**
 - **Public Works**
 - **Water**
- Check every pledge form for completeness
- Fill out the report envelope

Return materials by Oct. 7 to Maria Felix, Facilities Mgmt., General Services

ECAP

Develop a Campaign Plan

Meet with your ECAP Board Member to develop a campaign plan.

- Pick up pledge forms and posters at the agency fair registration desk.
- Display ECAP posters in areas often used by employees.
- Get an endorsement letter/memo from your department head or supervisor which shows support for the ECAP campaign.
- Post dates and times of meetings and/or rallies to share agency listings and information from the agency fair.
- Distribute and collect pledge forms. **Providing incentive gifts for food at presentations might encourage immediate completion of pledge form.**
- Prepare pledge envelopes and make daily deposits of cash/checks at one of the City cashier windows listed below:
 - **City Hall**
 - **Eastside City Hall**
 - **Hardesty Center**
 - **Park and Ajo**
 - **Public Works**
 - **Water**

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Sample Campaign Letter/Memorandum

Every good campaign begins with a letter or memo sent to all employees from their Department head. The following sample wording is provided for your convenience in helping your Department head to draft their own letter/memo of support.

Dear Fellow Employee:

I invite you to share in this Department's commitment to our community by contributing to local charities through ECAP (Employee Combined Appeal Program). ECAP is an efficient, effective and convenient way of meeting variety of charitable service needs. When contributing through ECAP, you may choose exactly which agencies receive your gift.

Your continued strong support of ECAP organizations is greatly appreciated by all for those in our community who need and provide these services. Last year the generosity of our employees provided \$168, 578 to local agencies through ECAP.

Our department campaign runs from September 1 to September 30. Please support our ECAP representatives with your full participation at the scheduled meetings. Take time to make an informed choice about contributing through this worthwhile program.

We appreciate your generosity and encourage you to use payroll deduction as the easiest way to ensure that vital programs and services remain available to you, your family and our community throughout the year.

Thank you for your support.

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We Need You!

It takes a lot of effort to put on the ECAP Kick-off event and we could use your help. We could use your skills, such as, coordinating, planning, purchasing, socializing, scheduling, and brainstorming.

For more information, please contact a Board member on the last page of this manual.

We hope you join us soon!

ECAP

Report Envelope



CITY OF TUCSON ECAP

REPORT
ENVELOPE

- 1 Department Name: _____
 Department Coordinator: _____
 Department Representative: _____
 Department Phone Number: _____
 Number of Employees Choosing Not to Participate: _____

2

METHOD OF CONTRIBUTION	NUMBER OF GIVERS	AMOUNT
Payroll Deduction		
Cash or Check		
Totals		

3

THIS BOX FOR UNITED WAY USE ONLY	
UW Account Number: _____	Date Received: _____
Batch: _____	Cash: \$ _____
Auditor's Initials: _____	Checks: \$ _____
Number of Pledge Forms: _____	Payroll Deductions: \$ _____
Number of Leadership Givers: _____	Leadership Giving Total: \$ _____

United Way of Tucson and Southern Arizona, 330 N. Commerce Park Loop, Suite 200, Tucson, AZ 85745. 520-903-9000.

INIT/DATE	
D.E.	___/___
D VER	___/___
POSTED	___/___

Return materials by Oct. 7 to Maria Felix, Facilities Mgmt., General Services

ECAP

Report Envelope Instructions

Use the pre-numbered envelopes in correct sequence. These envelopes are part of the audit trail.

All envelopes **MUST** be returned filled or unfilled for proper auditing of the campaign.

- 1. Confirm Label info: Department Name and Organization**
(use one envelope per organization number)
- 2. Print Department ECAP Representative name on envelope**
- 3. Sort ALL pledge forms by method of distribution:**
 - Payroll Deductions
 - Cash – Checks
 - Pledge forms of employees choosing not to participate

All one-time only gifts **MUST** be deposited into Account Number: **001-121-2200-R240**

Deposit cash and check donations at one of the following City cashier windows at:

City Hall
Park and Ajo

Eastside City Hall
Public Works

Hardesty Center
Water

You must get **two (2)** receipts from the cashier. **Attach one copy of cash receipt to pledge form. Give the other copy to the employee.**

Please Double Check Your Math!

Return materials by Oct. 7 to Maria Felix, Facilities Mgmt., General Services

Pledge Forms



Employee Combined Appeal Program 2017

Step 1. I Want My Donation to Help the Following Agencies:

I want my donation to help the following agencies listed in the ECAP Directory: The complete directory can be found at: www.unitedwaytucson.org/cotecap
 Please refer to the Agency List on the back for the Agency Codes, list as many agencies as you wish.

AGENCY CODE	AGENCY NAME	*AMT PER PAY PERIOD	*YEARLY AMT

*2017 will have 26 pay periods in the calendar year.

I want my donation to help these agencies NOT listed in the ECAP Directory: (MUST BE A 501(C) (3) AGENCY APPROVED BY IRS REGULATIONS)

AGENCY NAME	*AMT PER PAY PERIOD	*YEARLY AMT

Step 2. Make Your Gift

<p>A. Easy Payroll Deduction Payroll Deduction: I wish to donate the following amount from each paycheck. *\$25 *\$19.25 \$15 \$10 \$5 \$2 \$ _____ (circle desired amount) (other amount)</p> <p>B. One Time Donation Only (Check one line) ___ CASH/CHECK-payable to ECAP/Agency \$ _____ ___ PAYROLL DEDUCTION (onetime only) \$ _____</p> <p>My TOTAL annual amount \$ _____ *(annual donation of \$500 or more qualifies you as a Leadership Giver)</p> <p>C. I Do Not Wish To Participate _____ (initial here)</p>	<p>For donations of \$500 or more please print recognition name as you wish it to appear in the United Way Leadership Book or enter Anonymous.</p> <p>ACKNOWLEDGEMENT OF GIFT INFORMATION: ___ I wish to remain anonymous in United Way printed materials ___ I wish to remain anonymous to the agency(ies) receiving my donation ___ Yes, I wish to be acknowledged by the agencies. Home address below:</p>
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Step 3. Please Sign and Date Below if You Are Donating

<p>Signature _____ Date _____</p> <p>THANK YOU for your support of community needs through E.C.A.P.</p>	<p style="text-align: center;">LIVE UNITED</p> <p style="text-align: center;">United Way of Tucson and Southern Arizona UnitedWayTucson.org</p>
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I acknowledge that no goods or services were received by me for this donation. All gifts are tax deductible to the extent provided by IRS regulations. A 13.38% processing fee is charged to all gifts. Please retain a copy for your records.

Return materials by Oct. 7 to Maria Felix, Facilities Mgmt., General Services

Pledge Form Instructions

Employee must insert the Agency name and number and total annual amount that he/she is contributing.

Agency numbers are listed in the **2016 ECAP Agency Directory**. They are also available on-line at: <http://www.unitedwaytucson.org/cotecap>

The employee may contribute up to six different Agencies on the pledge form. A blank form may be attached for additional selections.

Employees may write-in an Agency not listed in the ECAP Agency Directory.
NOTE: All Agencies must be a 501(c)(3) agency and/or conform to ECAP bylaws.

Payroll Deduction: Employees must circle or insert the total amount they wish to donate from their bi-weekly paychecks.

Verify that the total amount is equal to 26 (pay checks) times the dollar amount. **This total annual deduction should equal the sum of the Annual Amount listed in Step 1 on the Pledge Form. Please remind employees that these deductions start Jan. 1, 2017 through Dec. 31, 2017.**

Employee MUST sign, date, and return the pledge form. Address must be included if employee wishes to be acknowledged by the recipient Agency.

One Time Donation: An employee may make a one-time only donation. Checks should be made payable to ECAP and the Cash/Check box should be checked on the pledge form.

All one-time only donations MUST be deposited into Account # 001-121-2200-R240. Make a copy of the deposit slip and attached it to the pledge form. When copying the deposit slip, please do not cover the agencies that the employee has listed.

**ALL EMPLOYEES MUST SELECT AN AGENCY.
ECAP REPRESENTATIVES AND BOARD MEMBERS ARE NOT AUTHORIZED TO
WRITE IN AGENCY NUMBERS FOR ANY EMPLOYEE.**

If an employee requests a copy of the pledge form, please provide a copy.

Note: A donation of \$500.00 or more classifies as a Leadership Gift through United Way.

Non-Participation: Employee must initial and check the 'I do not wish to participate' box in Step 2 on the Pledge Form. This will verify that the employee had the opportunity to participate if he/she wished to do so.

Employees must return the Pledge Form for auditing purposes.

Frequently Asked Questions

How much is our administrative cost?

13.38% of your pledge covers the cost of running the campaign and processing all the pledges throughout the year.

What if my favorite agency is not on the ECAP list?

Write-ins are allowed. Donations will be sent to any write-in agency that has a non-profit status with the IRS.

Why must I get a signature and/or return the form if the employee is not donating?

In year's past we have had employees approach us stating they never got the opportunity to donate, or did not know anything about the campaign. This is our way of ensuring that everyone gets the opportunity.

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Facts and Results

United Way Donations Help Seniors Remain Healthy and Active

- Enabled 9,465 vulnerable seniors to remain at home with supportive services
- Supported seniors and families through 109,840 hours of needed service from 3,295 active senior volunteers helping 3,847 seniors remain at home
- Mobilized four communities to engage more than 3,500 seniors to solve local community problems and affect policy and program changes

Donations Plus Leveraged Dollars = \$3,848,692

Every \$1 Donated = \$5.18 in additional support for seniors

United Way Donations Helped Young Children Prepare for Kindergarten and Life

- Promoted learning for 9,415 children in child care settings striving to improve quality and increase school readiness
- Gave 99,463 books to families with tips for reading to their child at home to promote early literacy skills
- Guided 2,787 high risk families in the community or at home to increase positive parenting skills and prevent child abuse
- Educated 725 early childhood teachers on best practice early education to increase child readiness for school and life

Donations Plus Leveraged Dollars = \$6,309,619

Every \$1 Donated = \$8.72 in other Early Education Support

United Way Donations Helped Youth Prepare for College, Work and Life

- Engaged 14,867 youth in quality after-school programs
- Developed new skills and competencies of 2,915 youth to better prepare for college, work or life
- Increased nutrition awareness and physical activity for 1,627 children and youth

Donations Plus Leveraged Dollars = \$1,392,679

Every \$1 Donated = \$1.92 in additional support for Youth

United Way Donations Helped Families be Financially Stable

- Prepared 16,907 income tax returns for families with more than 400 volunteers in 10 Arizona counties
- Brought in \$25.7 million in tax refunds to help family finances and fuel the economy
- Helped 20,602 families become more financially stable and meet their basic needs

Donations Plus Leveraged Dollars = \$1,767,510

Every \$1 Donated = \$2.44 in other Family Financial Stability support

United Way Donations for Collective Impact Fund

Total Collective Impact Donations Plus Leveraged Dollars = \$13,318,501

Every \$1 Donated = \$4.74 in other Collective Impact support

ECAP

City of Tucson Employee Combined Appeal Program

Mayor and Council Members



Mayor

Mayor Jonathan Rothschild

Council Members

Regina Romero, Ward 1

Paul Cunningham, Ward 2

Karin Uhlich, Ward 3

Shirley Scott, Ward 4

Richard Fimbres, Ward 5

Steve Kozachik, Ward 6

City Manager

Michael Ortega

ECAP

City of Tucson

2017 ECAP Board Members

Terry Lopez, President	Tucson Police	837-7804
Josie Cuestas, Vice President	Housing	837-2094
Maria Felix, Treasurer	General Services /Facilities	837-6338
Diane Link, Secretary	Finance/Budget	837-4074
Christina Runyan	Real Estate	837-6702
Cynthia Montalvo	Information Technology	471-7655
Jesus Felix	General Services/Facilities	837-6323
Samuel Urias	Parks & Recreation	791-5155
Marian Amoroso Bendetto	United Way Liaison	903-3927

<https://www.tucsonaz.gov/hr/ecap>

To get your name on this list, become an ECAP Board Member.

Call today!

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