

Table of Contents

Letter from President	1
What is ECAP	2
ECAP and United Way	3
ECAP Campaign Goals	4
Your Role as Representative	5
Develop the Campaign	6
Sample Campaign Letter/Memo	7
Report Envelope Instructions	8
Sample Report Envelope	9
New Pledge Form	10
Completing the Pledge Form	11
Frequently Asked Questions	12
Facts and Results	13
Mayor and Council	14
2011/12 Officers and Board Members	15
Notes	16

Letter from President

Dear ECAP Representative,

I would like to thank you all for taking time from your busy work schedule and come volunteer to be 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 still have the compassion to help their fellow citizens. With your assistance and the gracious contributions from our fellow co-workers ECAP raised \$193,139 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 ECAP'S success.

Sincerely,
Jesus Felix
President
2011/12 ECAP Board

Pledge Cards Due ~September 30~

What is E C A P ?

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 **E C A P** is:

Easy!

Cost effective by utilizing payroll deduction.

Agencies to support are selected by the employees.

Payroll deductions allows for donations to go where the *employee* wants it to help.

ECAP and United Way

.....A Partnership that Works!

- As our Fiduciary, United Way performs a number of vital functions:
- After each bi-weekly payroll, your deductions are sent by Payroll to United Way where they are deposited and segregated in a separate fiduciary bank account
- On a quarterly basis, they distribute 85% of your donation to the agencies selected by the employee
- United Way confirms the status of an agency's 501(c)3 status with IRS
- Maintains campaign and contribution records
- Keeps all 501(c) 3's, City of Tucson signed statements of non-discrimination, and the US Patriot Act compliance forms and other required documents
- United Way audits pledge forms and envelopes
- United Way ensures that ECAP remains in compliance with the IRS
- Assists in the designing and printing of posters, pledge forms and envelopes, the agency directory, training manual, and other print materials that are needed to make the campaign a success, and with a professional look
- Through payroll deduction, United Way helps ECAP to provide the best and easiest alternative for you to donate to the charity or agency of your choice
- Analyzes campaign results
- United Way continually leverages funds to maximize the benefits for agencies

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**

Your Role As Representative

Pledge forms Due ~September 30th~

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 cards and agency listings.
- Make daily deposits of cash and check donations with the city cashier at one of the following locations:
 - City Hall ~ Eastside City Hall**
 - Public Works ~ Water ~ Park & Ajo**
 - Hardesty Center**
- Fill out the report envelope and return by 09/30/11 or sooner, the earlier the better.

Return materials to MaryLou Lopez, Housing and Community Development

****PLEDGE FORMS DUE NO LATER THAN SEPTEMBER 30, 2011****

Develop the Campaign Plan

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

Get an endorsement letter/memo from your Department head or supervisor which shows support for the ECAP campaign.

Post ECAP posters in areas often used by employees.

Post dates and times of meetings and/or rallies to share agency listings and information from the agency fair.

Pick Up Pledge Cards at Agency Fair Registration Desk.

Distribute and collect Pledge Cards

*Providing incentive gifts or food at presentations might encourage **immediate completion** of pledge card.*

Prepare Report Envelopes and make daily deposits of cash and checks to one of the following cashiers:

- | | |
|----------------|----------------------|
| ~ City Hall | ~ Eastside City Hall |
| ~ Public Works | ~ Water |
| ~ Park & Ajo | ~ Hardesty Center |

Return materials to MaryLou Lopez, Housing and Community Development

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 of those in our community who need and provide these services. Last year the generosity of our employees provided \$193,139 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,

Pledge Cards Due ~September 30th~

****PLEDGE FORMS DUE NO LATER THAN SEPTEMBET 30, 2011****

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 & Organization**
(use one envelope per organization number)
- 2. Print Department ECAP Representative name on envelope**
- 3. Sort ALL pledge cards by method of distribution:**
 - * Payroll Deductions
 - * Cash - Checks
 - * Cards 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 with one of the following city cashiers: City Hall, Eastside City Hall, Public Works, Water and Park and Ajo and Hardesty Center.

You must get **TWO** (2) receipts from the cashier. **Attach one** copy of cash receipt to white copy of pledge card. **Return other** copy to employee.

Please Double Check Your Math !!

Return materials to MaryLou Lopez, Housing and Community Development

Pledge Cards Due ~September 30~

Report Envelope



CITY OF TUCSON
ECAP

REPORT
ENVELOPE

- 1 Organization Name: _____
- Organization Number: _____
- 2 Organization Coordinator: _____
- Organization Representative: _____
- Number of Employees Choosing Not to Participate: _____

3

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

THIS BOX FOR UNITED WAY USE ONLY

UW Account Number: _____ Date Received: _____

Batch: _____ Cash: \$ _____

Auditor's Initials: _____ Checks: \$ _____

Number of Pledge Forms: _____ Payroll Deduction: \$ _____

Number of Leadership Givers: _____ Leadership Giving Total: \$ _____

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

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

New Pledge Forms

ECAP



Employees Combined Appeal Program 2010-2011

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:
Please refer to the Agency List on the back for the Agency Codes, list as many agencies as you wish.

The complete directory can be found at
www.unitedwaytucson.org/cotecap

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

*2011 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

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)

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 (Please Print):

B. One Time Donation (Check one box only)

CASH/CHECK (payable to ECAP) \$ _____

PAYROLL DEDUCTION (onetime only) \$ _____

My total annual donation is \$ _____
*(annual donation of \$500 or more qualifies you as a Leadership Giver)

I do not wish to participate _____
(initial here)

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:

Step 3. Please sign and date below:

Signature _____ Date _____

Optional SSN _____

THANK YOU for your support of community needs through E.C.A.P.



United Way of Tucson and Southern Arizona

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 15% processing fee is charged to all gifts. Please retain a copy for your tax records.

COMPLETING THE PLEDGE FORM

Insert the Agency Name and Number and *total Annual Amount* you are contributing to that Agency.

Agency numbers are listed in the 2011-2012 ECAP Agency Directory. They are also available on-line at: <http://www.unitedwaytucson.org/cotecap>

The Pledge card has room to contribute up to six different Agencies of the employees choice, (a blank form may be used for additional choices).

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

Employee must circle or insert the total amount they wish to donate from their *bi-weekly* paychecks and Insert the *total annual* amount of deduction.

Verify that total amount is equal to 26 (paychecks) times your dollar amount. *This total annual deduction should equal the sum of the Annual Amounts listed in (1) above.*

If employee prefers to make a one time only gift, they will insert the amount. *Make checks payable to ECAP and select one time donation on the pledge form.*

All one-time only gifts MUST be deposited into Acct. # 001-121-2200-R240.

For payroll deductions Employee MUST sign, date, and return pledge card. address must be included if employee wishes to be acknowledged by the recipient Agency.

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

If employee requires a copy please make a copy for him/her.

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

Please double check the math!

Frequently Asked Questions

- © **How much is our administrative cost?**
15% of your pledge covers the cost of running the campaign and processing all the pledges throughout the year.

- © **What is 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 all get the opportunity.

- © **Why the space for the Social Security Number, can't we just use Employee numbers?**
Payroll can only input payroll deductions by SSN number. It helps payroll and saves them a great deal of time if they do not have to look up each employee to record their deduction.

Facts and Results

- **EDUCATION**

Juvenile crime rates surge between 3 and 6 p.m. and triples the first half hour after school. Youth who are not meaningfully occupied after school are more likely to engage in criminal behavior during out of school time.

– With coordinated support from the Boys and Girls Club, YMCA, Tucson Urban League, Pio Decimo Center, La Frontera, and Children & Family Resources, 4200 racially and ethnically diverse youth participated in high quality, after-school programs offered at least 4 days a week from 3 to 6 p.m.

- **HEALTH**

200,000+ Pima County residents are over age 60. Many who live alone feel isolated, lonely and abandoned. This can lead to physical illness, clinical depression and suicide. The suicide rate for Arizona seniors is 46% above the national average.

– Last year, through the United Way and its partners' efforts, more than 900 seniors, donating more than 110,000 hours of service as literacy tutors, as support for homebound seniors, and as neighbors helping neighbors. In addition, more than 500 family caregivers received information, training and support to help them care for their loved ones.

- **INCOME**

Nearly 16% of residents in Pima County live at or below the poverty level, more than 50,000 of which are children. Many families have zero savings.

– Assistance from (VITA) Volunteers to prepare 7,286 tax returns helped families claim their tax credits and refunds equaling more than \$5.7 million in Earned Income Tax Credits and \$12.8 million in overall federal tax refunds. As families spent their refunds in the community, it generated more than \$20 million in economic activity for our region. Additionally, taxpayers were saved nearly \$2 million in tax preparation fees and interest on refund anticipation loans.



Mayor and Council

Mayor Robert E. Walkup

Vice Mayor Richard Fimbres, Ward 4

Council Members

Regina Romero, Ward 1

Paul Cunningham, Ward 2

Karin Uhlich, Ward 3

Shirley Scott, Ward 4

Steve Kozachik, Ward 6

City Manager

Mike Letcher

2011 ECAP Board

Jesus Felix, President	General Services	837-6323
Jeri Ward, Vice President	Transportation	837-6758
Carolina Almarez, Secretary	City Manager Ofc	837-4051
Mary Lou Lopez, Treasurer	Housing	837-5391
Lea Castillo	Water	837-2094
Maria Felix	General Services	837-6338
Terry Lopez	Police	837-7084
Carl White	Parks & Rec	791-5155



NOTES:

NOTES:

NOTES: