2020 Training Manual

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

https://www.facebook.com/cotECAP/

ECAP@tucsonaz.gov
August 27, 2020

Dear ECAP Representative,

I would like to thank you all for taking time from your busy work schedule to volunteer as an ECAP Representative. With your assistance and the gracious contributions from our fellow co-workers ECAP raised **$119,742.00** last year. This money will help hundreds of local charitable agencies assist those in with the greatest needs in our community.

This year has been a very challenging for our City, the Nation and the World. As we confront these challenges, we must keep in mind that while the vast majority in our community will overcome it, many will not. It is more important than ever that we pull together as “One City, One Team” and demonstrate compassionate, supportive leadership.

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.

Also remember to never use an employee’s social security number for identification.

Thank you again for volunteering to be a key member of ECAP’s success.

Sincerely,

Shelly Urias
President
2020 ECAP Board
What is ECAP?

The Employee Charitable Aid Program is the single solicitation effort at the workplace, which provides financial support to hundreds of local agencies in Southern Arizona.

Our mission is to create a culture of caring in the workplace by offering City employees the opportunity to build our community through charitable organizations that serve Tucson and Southern Arizona.

Contributing through **ECAP** is:

1. **E**asy
2. **C**ost effective
3. **A**dvantageous to the community
4. **P**ayroll deductible
ECAP and United Way... a Partnership that Works!

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

- After each City bi-weekly payroll period, your deductions are sent by Payroll to United Way.
- United Way deposits donations 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 deductions to 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.
ECAP 2020 Campaign Goals

1. **Build** a caring community.

2. **Increase** employee participation by 5%.

3. **Increase** our average contributions.

4. **Increase** the overall use of payroll deductions.

5. **Provide** opportunities to educate employees about agency services.
The Role of a Representative

Representative efforts make a huge difference in improving lives and building a stronger community. With United Way we can ensure that employees have the tools and information to support their agency of choice.

As an ECAP Representative your responsibilities include:

- Meeting with the ECAP Board to brainstorm campaign strategies
- Helping to raise funds for participating agencies
- Developing & leading a campaign at the department/division level
- Encouraging employees to contribute through the online portal
- Reviewing department pledge percentages & opt-outs weekly.
- Assisting employees with online giving platform
- Checking in with employees periodically
- Distributing pledge forms/website links and agency listings
- When needed, making deposits of cash/check donations at a City Cashier window
- Having fun and working toward increased community support
Sample Campaign Plan

These are suggested activities to help make your department campaign a success. Be creative in what you do and share what works and what doesn’t using our ECAP Rep Team chat room.

☑ Obtain endorsement video or letter from Department Director to distribute on September 1st.

☑ Post ECAP fliers to Department Team rooms, intranet/internet pages, and bulletin boards weekly.

☑ Schedule department meetings to walk-through the online giving portal and virtual agency fair site.

☑ Set-up and share “office hours” to provide one-on-one help to employees with the online giving portal.

☑ Hold a mid-campaign and end of campaign department raffle using the data received from United Way (prizes provided by ECAP Board).
Sample Campaign Letter/Memorandum

A good campaign begins with a letter or memo sent to all employees from the Department head. The following is a sample provided to assist your Department head in drafting 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 Charitable Aid Program).

Your continued support of ECAP organizations is greatly appreciated by those who need and provide the services that they offer. Last year the generosity of our employees provided $119,742.00 to local agencies through ECAP.

Our campaign runs from September 1st through October 16th. Please take time to make an informed choice about contributing through this worthwhile 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.

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.
# Report Envelope

## City of Tucson ECAP

1. **Department Name:**
2. **Department Coordinator:**
3. **Department Representative:**
4. **Department Phone Number:**
5. **Number of Employees Choosing Not to Participate:**

### Method of Contribution

<table>
<thead>
<tr>
<th>METHOD OF CONTRIBUTION</th>
<th>NUMBER OF GIVERS</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Deduction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash or Check</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### This Box for United Way Use Only

<table>
<thead>
<tr>
<th>UW Account Number</th>
<th>Date Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch</td>
<td></td>
</tr>
<tr>
<td>Auditor’s Initials</td>
<td></td>
</tr>
<tr>
<td>Number of Pledge Forms</td>
<td></td>
</tr>
<tr>
<td>Number of Leadership Givers</td>
<td></td>
</tr>
</tbody>
</table>

Date Received: ____________________________
Cash: $ ____________________________
Checks: $ ____________________________
Payroll Deductions: $ ____________________________
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 ___

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**Return materials by November 6, 2020 to Jesus Felix, Facilities Mgmt., Environmental and General Services**
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
- Eastside City Hall
- Hardesty Center
- Park and Ajo
- Public Works
- 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 November 6, 2020 to Jesus Felix, Facilities Mgmt.,
Environmental and General Services.
Online Giving Portal

1. United Way of Tucson and Southern Arizona will send previous contributors a registration email. All others can register at: https://cityoftucsonecap.uwtucson.stratuslive.com/.

2. Employees will follow the link to register for this year’s campaign.

3. At the StratusLive login page, employees will need to add a User Name, Business Email (COT Email), Password and Confirm Password.

4. A confirmation email from StratusLive will be sent to the COT email with the Subject “Confirm your email address”.

5. Click the “Confirm my email address” button; this will take you to your account.
6. Click “Save”. This will return you to https://cityoftucsonecap.uwtucson.stratuslive.com/.

7. Click the “Click to Give Now” button.

8. Enter your contact information (ensure address is correct to receive a physical acknowledgment from United Way).
9. Choose your Payment Method. Multiple methods can be chosen (Payroll deduction, Credit Card, or Check).

10. Add the amount you would like to give.

11. Choose the Charity you would like to contribute to. *Spotlight agencies will be showcased on the first page. You can choose to “Find a Charity” at the bottom to look for more.
12. Use the Charity Picker to search by name or Catalog number in the “Search by Charity Name” field. To Write-In an agency, enter “Write-In” as the Charity Name.

13. Choose the Charity and hit the button “Add to Designations”. *Get more information about Affinity Groups (Young Leaders United, Women United) if your contribution qualifies.

14. Review and complete your gift. Click “Finish” to complete your pledge. You will receive an immediate online acknowledgement once you submit your pledge. You will also receive a pledge confirmation email.
Pledge Forms

When paper forms are needed, they can be printed from the web address below. Certain Divisions will still receive paper pledge forms this year. New employees can print forms by visiting: https://www.tucsonaz.gov/files/hr/ecap/ECAP_pledge_fillable.pdf.
Paper Pledge Form
Instructions

Employee must write in the Agency name, Agency number, Amount per pay period and total annual amount that he/she is contributing.

Agency numbers are listed in the 2020 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, 2021 through Dec. 31, 21.**

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.**

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

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.
Frequently Asked Questions

Where can I find a blank form, training manual, and the agency directory?
You can find it all here at https://www.tucsonaz.gov/hr/ecap.

I don’t want to participate. Do I have to sign and return the form/login to the portal?
In order to ensure that everyone gets the opportunity to participate in ECAP, we encourage all City of Tucson employees to submit a form. You have the option to decline on both.

If my agency is not listed in the directory, can I write it on the pledge form?
Yes, you can write the agency name on the pledge form. Keep in mind that the agency must have a 501(c)(3) status with the IRS.

The ECAP Board reserves the right to remove any organization from the agency listing due to lack of funding for two consecutive years. Organizations that are removed from the agency listing will be notified in writing by ECAP City of Tucson.

Please be aware that the agency still has the potential to receive donations from the City of Tucson employees but it will not be included in the ECAP agency directory until the agency resubmits new documents prior to the cutoff date as specified in the letter.

How much is the administrative cost for this campaign?
13.38% of your pledge covers the cost of running campaign and processing all the pledges throughout the year. Keep in mind this cost also includes the printing of all pledge forms, envelopes, department lists, posters, training manuals, and the agency directories.

Who do I contact if I want to join ECAP?
You can contact anyone on the list in the back of the training manual. Board meetings, the Kick-off, and the Appreciation luncheon are all conducted during work hours.

My supervisor told me I could not attend the agency fair. Who is allowed to go?
This campaign is supported by the City Manager’s Office; therefore, all City employees are allowed to go to the agency fair. This fair is presented to you so that you can one-stop-shop for help or information on issues you are currently experiencing in your life whether it be heart issues, diabetes, cancer, etc.

How many pay periods in a year?
Typically, 26 pay periods. The number of pay periods is listed on the pledge form in small print just below the first table.

When do my deductions start?
Your deductions start January 1 and go through December 31.
Facts and Results

United Way Donations Helped Seniors Remain Healthy and Active

- Enabled 29,108 vulnerable seniors to remain at home with supportive services
- 1,740 people given tools to plan for End of Life through workshops and coaching sessions

United Way Donations Helped Young Children Prepare for School and Life

- 165,600 books given to children to build their personal libraries
- 697 Opportunity Youth connected back to education and career pathways

United Way Donations Helped Families Be Financially Stable

- 10,400 low-income families in Arizona received free tax preparation
- Brought in $22.2 million in federal tax refunds to help family finances and fuel the economy
Mayor and Council Members

**Mayor**
Mayor Regina Romero

**Council Members**
Lane Santa Cruz, Ward 1
Paul Cunningham, Ward 2
Paul Durham, Ward 3
Nikki Lee, Ward 4
Richard Fimbres, Ward 5
Steve Kozachik, Ward 6

**City Manager**
Michael Ortega

**Assistant City Managers**
Albert Elias
Joyce Garland
2019 ECAP Board Members

**Officers**
Shelly Urias, President
Lynette Kaplan, Secretary
Demetria Lopez, Treasurer

**Members At-large**
Jesus Felix, Environmental & General Services
Maritza Felix, Business Services
Danielle Nunez, Tucson Fire
Fernanda Quintanilla, Transportation & Mobility
Diane Sotelo, Human Resources
Sam Urias, Parks & Recreation
Alyssa Villa, Parks & Recreation
Arika Wells, Human Resources

**United Way Representatives**
Bruce Ayers
Rhonda Wren

We are looking for your help in coordinating, planning, purchasing, socializing, scheduling, and brainstorming for ECAP.

If you are an energetic, optimistic planner with great ideas to help us increase outreach, contact a Board Member or email [ECAP@tucsonaz.gov](mailto:ECAP@tucsonaz.gov) to join today!