



Pima pays it forward!

TRAINING MANUAL



2012
2013



www.pima.gov/ECAP



ECAP 2012

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WELCOME!

Thank you for joining the ECAP Team!

As an ECAP representative all keys players in the effort to help thousands of people in our community. Last year ECAP team members raised over \$439,000 for local agencies in Pima County.

This guide provides the information and resources needed to plan and carry out a successful campaign. You can also call upon the Pima County ECAP Steering Committee and the United Way staff listed on page 31 to help you with every phase of the campaign.

The ECAP experience is both professionally and personally rewarding. Good luck with your campaign. We are confident that you can make this your department's most successful ECAP campaign yet.

YOU are the key to ECAP's success!

Thank you for caring and sharing!

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What is ECAP?

The Employees Combined Appeal Program (ECAP) is the single solicitation effort at the work site, which provides financial support for over 275 charities in our community.

ECAP works by:

1. Your money is well spent - **100%** of your donation goes to the agency of your choice.
2. ECAP is cost effective and easy by utilizing payroll deduction.
3. You choose which agency your donations go to - an agency list is available for review.

ECAP contributing means:

1. Helping people who really need help.
2. ECAP makes sure your donation helps right here in your community.

ECAP Campaign Goals:

1. Build a better community!
2. Increase participation.
3. Increase average contribution.
4. Increase the use of payroll deduction.
5. Increase the number of presentations to educate employees about agency services available to them.

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Fund-Raising Model

- Assign department coordinators and solicitors.
- Plan your strategy.
- Create a memo from your department director.
- Recruit motivated team players.
- Carry out your strategy.
- Distribute, retrieve, and review all pledge forms.
- Verify envelopes and return to Shelley Rose.
- **Thank your coworkers!**

You are the visible link between your co-workers and those who need help in our community!

Coordinator's Job Duties:

- ✓ Recruit Solicitors
- ✓ Schedule ECAP presentations
- ✓ Distribute pledge forms
- ✓ Collect ECAP pledge forms from solicitors
- ✓ Tabulate and verify totals on envelopes
- ✓ Return completed ECAP forms to:
Shelley Rose at NRPR - Ellie Towne Center

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Solicitor's Job Duties:

- ✓ Meet with coordinator
- ✓ Schedule presentations
- ✓ Collect Pledge forms from employees
- ✓ Tabulate and verify totals
- ✓ Return completed contribution envelope to ECAP Coordinator

Expanded Duties

- Providing information to your coworkers allows them to make an informed decision about giving through ECAP.
- Lead, instruct, and motivate your coworkers!
- Make sure everyone has the opportunity to attend a presentation.

**Complete the campaign within
the allotted time frame**

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Plan Your Strategy

Things to implement when planning a successful campaign:

- Educate yourself on the importance of the ECAP Campaign.
- Conduct a campaign meeting for management advising them of campaign plans, goals and timeline.
- Conduct ECAP coworker meetings and/or rallies and initiate one on one contact with coworkers.
 - ✓ Advertise the day, date, and time of group meetings/rallies. Get commitments from employees to attend.
- Anticipate common objections and responses.
Responses to common objections:
 - ✓ ***Too much money raised by ECAP goes for administrative costs.***
100% of your pledge will go directly to the agency that you designate through ECAP.
 - ✓ ***I didn't get a raise this year or last. Why should I help my department raise money when they can't give me more money?***

Remember, you aren't contributing to your department but to your community.

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- ✓ ***It is no one's business how much I give. Besides, the giving guidelines are too high.***

The guideline is just that, a guide. Using payroll deduction spreads your gift over a year.

- ✓ ***These agencies only help the poor.***

Services help many people throughout all sectors of our community for the benefit of everyone. These services that are listed in the Agency Directory include youth programs, family counseling, day care, education and diagnostic programs, and drug and alcohol treatment programs. None of us knows when tragedy will strike or when we'll need help. We all benefit from living and working in a healthier, happier community.

- Implement a strong recognition program.

Distribute pledge forms, agency directories and incentives at presentations. Answer any questions employees may have. Encourage immediate completion of the pledge form.

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Creating Letter/Memo from Department Heads in Support of ECAP

Every good campaign begins with a letter or memo sent to all employees from their department head. Here is a testimonial from the Pima County Administrator on his commitment to this cause:

"I was born and raised in Tucson, and in that time this community has grown by leaps and bounds, and it is expected to continue in that vein. In order to meet the needs of our community, we as individuals and as a group must recognize the needs of our fellow citizens. ECAP is just one of the instruments Pima County has used in order to provide our fellow citizens with that much needed help. For the past 24 years ECAP has played a major role in helping this community and I consider ECAP to be one of the most important resources we as Pima County employees have to offer. Therefore, it is my hope that all Pima County employees are provided the opportunity to make a difference. This difference can only be made by providing the resources, support, and guidance needed to show each individual that they can and do make a difference."

Chuck Huckelberry
County Administrator

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We include the following samples for your convenience in helping your department head to draft his/her own letter or memo of support for the ECAP Campaign.

Dear Fellow Employees:

I invite you to share in this department's commitment to our community by contributing to local charities through ECAP (Employees Combined Appeal Program). ECAP is an efficient, effective and convenient way of meeting a variety of (health and charitable human care) 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 **1910** of our employees provided over **\$439,000** to local agencies through ECAP.

Our department campaign runs from **September 20th to October 26th**. Please support our ECAP solicitors **(name)** and **(name)** with your full participation at the meeting scheduled for **(day, date, time)**. 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 neighbors throughout the year.

Thank you.

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How to Make a Gift

Use a ballpoint pen. Press firmly. PRINT all information legibly.

ECAP
Employees Combined Appeal Program 2012 - 2013

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.pima.gov/ecap or www.unitedwaytucson.org/pcecap

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

*2013 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
I authorize my employer to deduct the following amount from my paycheck each pay period.
\$ _____

B. One Time Donation (Check one box only)
 CHECK (payable to ECAP) \$ _____
 CASH \$ _____
 Payroll Deduction (One time only) \$ _____

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): _____

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. Home address below: _____

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

Step 3. Please sign, date and return if donation is made:

Employee Signature _____ Date _____

I do not wish to participate at this time: _____
Please Initial & Return

100% OF YOUR DONATION GOES TO ADDRESS COMMUNITY NEEDS. THANK YOU FOR YOUR SUPPORT!
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.

#1 DESIGNATION CHOICE: Print the four-digit agency code, agency name, amount per pay period and total yearly amount of your gift. ECAP agencies and codes are listed in the Agency Directory.

To designate your gift to an agency other than those listed in the ECAP Directory, PRINT the name of the local health and human care agency on the line provided.

#3 SIGN and DATE your pledge form. PRINT your home address if you wish your agency to acknowledge your gift.

#2 A.) EASY PAYROLL DEDUCTION: is an effective way to give throughout the year. Write the amount of your gift for each pay period.
B.) ONE TIME DONATION: Mark check, cash or payroll deduction and enter amount of one-time gift.
WRITE YOUR TOTAL ANNUAL DONATION on the final line provided.

NOT PARTICIPATING - All employees should return their pledge form whether they wish to participate or not.

Make check payable to ECAP. Attach cash/check securely to the pledge form.

Ask employees if they have any questions

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- ✓ Ask the employees to fill out the pledge form. Remind them of the department deadline for forms to be returned to you if not returned at a presentation.
- ✓ Collect pledge forms after a presentation, if possible.
- ✓ Conduct one-on-one meetings with employees that were not able to attend a meeting or presentation.
- ✓ Thank participants.
- ✓ Turn in all pledge forms to the coordinator.
- ✓ *Providing incentive gifts at presentations might encourage immediate completion of pledge form.*

Collect, Review, Return Pledge Form

Please make sure each pledge form has been correctly completed. Each of the following sections should be completed depending on the type of contribution.

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Step 1. I want my donation to help the following agencies:

Step 1 should be completed along with the Agency Code, Agency Name, amount per pay period and the yearly contribution the employee wishes to make to that organization. Please see Agency Directory for Codes.

If the employee chooses an organization that does not appear in the Agency Directory use the 2nd set of boxes in Step 1.

If the employee does not designate to any particular agency, the donation will be divided equally among three community impact areas: children, families and seniors. The employee can choose a prelisted donation or write in an amount of their choice.

Step 2. Make Your Gift:

- A. The employee needs to write the total amount that will be deducted from each pay period.
- B. If the employee is making a one-time donation they need to mark Check, Cash or Payroll Deduction. Then enter the total amount of the one-time gift.

All checks must be payable to ECAP.

The employee should write their total annual donation on the line provided.

Step 3. Please sign, date and return.

Finally, the employee must sign and date the pledge form. If they are **NOT PARTICIPATING** they should initial Step 3. If an employee does not wish to participate and refuses to initial, please write refused on the pledge form.

If there are any discrepancies please contact the employee and have them make the necessary corrections.

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Reconciliation of Envelope

1. Pre-numbered envelopes are part of the audit trail.
Return ALL envelopes, filled or unfilled.
2. Department name, i.e. Human Resources
3. Enter cost center (unit) number, i.e. 2500204.
One per envelope, please.
4. Department/Division Coordinator, PLEASE PRINT
5. Solicitor, PLEASE PRINT
6. Sort pledge forms by method of contribution:
(Please no more than 50 pledges per envelope)
 - a. Payroll deduction: total number of givers using this method.
 - b. Total dollar amount given through payroll deduction.
 - c. Cash contributions: total number of givers using this method.
 - d. Total dollar amount of cash from pledge form.
 - e. Check contributions: total number of givers using this method.
 - f. Total dollar amount of checks from pledge forms.
(Note: Verify that checks have been made payable to ECAP).
 - g. Total number of givers ($a + c + e = g$).
 - h. Total amount of contributions ($b + d + f = h$).

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Partial _____
 Complete _____
 Number of Pledges _____



REPORT ENVELOPE

1

PIMA COUNTY ECAP

Dept. Division Names: 2 _____

Cost Center #: 3 _____

Dept./Division Coordinator: 4 _____

Solicitor: 5 _____

6 METHOD OF CONTRIBUTION	NUMBER OF GIVERS	AMOUNT
Payroll Deduction	a	b
Cash	c	d
Check	e	f
TOTALS	g	h

THIS BOX FOR UNITED WAY USE ONLY	
UW Account # _____	Cash: \$ _____
Batch: _____	Checks: \$ _____
Auditor's Initials: _____	Payroll Ded: \$ _____
Date Received: _____	<small>LEADERSHIP GIVING</small> Number of Givers _____ Total \$ _____

United Way of Tucson and Southern Arizona 330 N. Commerce Park Loop, Suite 200 Tucson, AZ 85754 903-9000

	INIT/DATE
D.E. _____	_____/____/____
D VER _____	_____/____/____
POSTED _____	_____/____/____

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7. Divide the pledge forms into three groups:
 - a. Payroll deduction pledge forms
 - b. Cash/Check/Money Order
 - c. No donation pledge forms

Paper clip or rubber band the cash/check/money order pledge forms and corresponding contributions, and place inside the report envelope.

Paper clip or rubber band the payroll deduction pledge forms, and place inside the report envelope.

Paper clip or rubber band the "non donation" pledge forms, and place inside the report envelope.

8. Return signed and sealed envelope to your ECAP department coordinator.
9. Due date for envelopes is October 26, 2012 to:

Shelley Rose, ECAP Chair
Ellie Towne Flowing Wells Community Center
1660 W. Ruthrauff Rd.
Tucson, AZ. 85705
(520) 887-9786

ECAP 2012

Thank Your Coworkers!

It is important to thank those individuals that contributed to ECAP. Letting them know just how much they are appreciated is a small gesture compared to the help their contribution will provide.

Here is a sample thank you letter:

Dear ECAP Donor:

Once again you have gone the extra mile for our community. Your donation through ECAP helped make Tucson a better place for everyone. Thank you for contributing to this year's ECAP Campaign.

Because of our continued support, local agencies will receive the ongoing help needed to provide vital health, family, and youth services for the neediest in greater Tucson. We cared enough to help one another and to meet the needs of those around us. Together we are building a better community.

Thanks again.

Sincerely,

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Client Outcomes:

EDUCATION

United Way Donations Helped Young Children Prepare for School and Life

- Promoted learning for 8,122 children in child care settings striving to improve quality and increase school readiness
- Gave 43,295 families books with tips for reading to their child at home to promote early literacy skills
- Guided 2,153 high risk families in the community or at home to increase positive parenting skills and prevent child abuse.
- Educated 1,761 early childhood teachers on best practice early education teaching skills

Donations Plus Leveraged Dollars = \$8,662,380
Every \$1 Donated = \$11.36 in other Early Education Support



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

- Engaged 3,887 youth in quality after-school programs
- Developed new skills and abilities of 2,120 youth to better prepare for college, work or life
- Increased nutrition awareness and physical activity for 1,402 children and youth

Donations Plus Leveraged Dollars = \$1,410,800
Every \$1 Donated = \$1.85 in additional support for Youth

ECAP 2012

INCOME

United Way Donations Helped Families be Financially Stable



- Prepared 8,558 income tax returns for families through the help of 125 volunteers
- Brought in \$12.6 million in tax refunds to help family finances and fuel the local economy
- Helped 5,387 families become more financially stable and meet their basic needs and 93% of families reported that the support improved their financial situation.

Donations Plus Leveraged Dollars = \$1,143,255

Every \$1 Donated = \$1.49 in other Family Financial Stability support

ECAP 2012

HEALTH

United Way Donations helped Seniors Remain Healthy and Active

- Taught 3,655 senior caregivers new skills to better support 4,500 vulnerable seniors
- Support seniors and families through 187,271 hours of needed service from 6,168 active senior volunteers
- Mobilized three communities to engage more than 200 seniors to solve local community problems and affect policy and program changes.

Donations Plus Leveraged Dollars = \$3,818,845

Every \$1 Donated = \$4.76 in additional support for seniors



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Check List:

- [] Have you received your materials for the ECAP Campaign?
- [] Have you met with your supervisors to discuss needs and plans for the campaign?
- [] Have you composed an endorsement letter/memo from your supervisor which shows support for the ECAP campaign?
- [] Have you planned your strategy?
- [] Have you recruited and organized as many volunteers as needed to help cover all presentations and paperwork?
- [] Have you talked with your coordinators and solicitors and scheduled presentations?
- [] Have you publicized your campaign goal, plans and dates?
- [] Have you contacted everyone in your assigned area?
- [] Have you made arrangements to talk to employees who did not make it to one of the scheduled informational meetings?
- [] Have you collected pledge cards and prepared report envelope?
- [] Have you said, "THANK YOU."?
- [] Due date for envelopes is October 26, 2012 to:

Shelley Rose, ECAP Chair
Ellie Towne Flowing Wells Community Center
1660 W. Ruthrauff Rd.
Tucson, AZ. 85705
(520) 887-9786

**If you have any questions, please call anyone listed on page 20.*

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Pima County ECAP Steering Committee

Name	Department	Phone
Shelley Rose, Chair	NRPR	887-9786
Audrey Rogers, Co-Vice Chair	Health	243-7914
Rachel Affield, Co-Vice Chair	Health	243-7703
Sharon Hill, Secretary	PCPL	594-5392
Ana Guerrero	NRPR	877-6000
Margo Chavez	Public Defender	243-6902
Charlotte Watts	Institutional Health	243-7835
Barbara Denny	Environmental Quality	243-7400
Debra Rodriguez	Sustainability & Conservation	740-6940
Diane Luber	Communications Office	724-3739
Johnny Romero	NRPR	399-5819
Sylvia Escobar	Institutional Health	243-7857

United Way of Tucson and Southern Arizona

Sharhonda Woods Resource Development Director 903-3936