Department Campaign Coordinator Manual

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What is UA Cares?
UA Cares is a University of Arizona faculty & staff giving initiative providing UA employees with the opportunity to support UA services and programs and the broader community. Through UA Cares, employees can give to any University programs and services through the UA Foundation or to any non-profit organizations or Community Impact Areas through the United Way of Tucson and Southern Arizona.

Why Should I Participate in UA Cares?

CHOICE – Through UA Cares, employees can give to any University programs and services through The University of Arizona Foundation, to any 501 (c)(3) non-profit organizations or Community Impact Areas through the United Way of Tucson and Southern Arizona, or any combination of the above.

EASE – Employees can contribute by payroll deduction, personal check, or credit card. Employees can give by submitting a paper pledge, or online through UAccess (payroll deduction gifts only).

SUPPORT OUR COMMUNITY – UA Cares makes it easy to support our community. Through UA Cares, the University of Arizona facilitates community giving as part of its mission.
Participation in the campaign is completely voluntary and each employee makes a personal choice in deciding whether to participate.

For more information, please visit the following websites:

**UA CARES**
www.uacares.arizona.edu

**UA Foundation**
www.uafoundation.org

**United Way of Tucson & Southern Arizona**
www.unitedwaytucson.org

**IMPORTANT CAMPAIGN DATES**

**Kick Off Event**
Tuesday, October 6, 2015
8:30am – 10:00am
Student Union South Ballroom

Come and meet some of the people who oversee programs on campus and in the community...the very services you’ll be supporting during the UA Cares campaign for giving! Enjoy a nice continental breakfast and hear personal stories of those who have been helped by UA Cares.
UA Cares Campaign Timeline
The UA Cares campaign begins Tuesday, October 6, 2015 and ends Friday, November 20, 2015. We will continue to accept paper pledges at any time.

Envelope Drop-Off Points

Main Campus
- Friday, November 20, 2015 – 8:30am – 10:00am – Admin Building, Main Floor Lobby
- Monday, November 23, 2015 – 11:30am – 12:30am – Admin Building, Main Floor Lobby

AHSC
- Tuesday, November 24, 2015 – 11:30am – 12:30pm – UAMC (site to be determined)
- You may also arrange a drop off by calling the UA Cares office at 626-4671.

Culmination Event

Tuesday, February 2, 2016
3:00 pm – 4:30 pm
Vine Street Annex

Come celebrate your work on this year’s campaign. Free drawings will be held throughout the event. Complimentary appetizers and refreshments will be served. Strictly fun!
CAMPAIGN CONTACTS

The Office of Community Relations
www.uacares.arizona.edu
If you have general questions regarding the UA Cares campaign, please contact the Office of Community Relations.

Sheila McGinnis, Director of Outreach & Community Partnerships  
626-4671  
uacares@email.arizona.edu

The University of Arizona Foundation
www.uafoundation.org
To obtain fund account numbers, please visit:

To obtain information about gifts to the University, please contact:
Krista Voth, Director, Office of Annual Giving  
621-6585  
krista.voth@uafoundation.org

United Way of Tucson and Southern Arizona
www.unitedwaytucson.org
To obtain United Way materials, to book a presentation or if you have questions about United Way, please contact:

Merry Fennesy, Associate Development Officer  
903-3987  
mfennesy@unitedwaytucson.org
GIVING OPTIONS

You may direct your gift to any 501(c)(3) non-profit(s) or any United Way Community Impact Areas through the United Way of Tucson and Southern Arizona, any University of Arizona department or program through UA Foundation, or any combination of the above.

United Way of Tucson & Southern Arizona

UA Employees Can Contribute to:

- Any non-profit organization(s) having 501(c)(3) status.
- Any number of the three Community Impact Areas (Education, Income, Health), or Helping Working Poor Fund
(To obtain more information about United Way giving areas please visit their website at www.unitedwaytucson.org)

UA Foundation

UA Employees Can Contribute to:

- UA Employee Emergency Fund, Designation ID: 20-10-2005

- Arizona Assurance Endowment, Designation ID: 40-11-6352 an anonymous donor is matching dollar for dollar up to 30K!!!

- Scholarship and Fellowship Endowments

- Any University project or area. To find the name and designation ID, please visit the UA Foundation website at www.uafoundation.org and click on Find A Gift Opportunity – Giving Search.

UA employees may give through both the United Way and UA Foundation by filling out the top and bottom sections of the pledge form and returning both sections to their department coordinator, or by donating payroll deductions through UAccess and giving through both giving options.

Undesignated contributions will be directed to the following areas:

United Way: Community Impact Fund - helps all three Community Impact Areas

UA Foundation: Arizona Assurance Endowment
HOW CAN AN EMPLOYEE MAKE A CONTRIBUTION?

Employees have the following choices for payment in this year’s campaign:

- Payroll Deduction – by pledge form or UAccess
- Personal Check – by pledge form only (Payable to United Way and/or to the UA Foundation)
- Credit Card – United Way: By pledge form only.
- Credit Card – UA Foundation: Go to www.uafoundation.org/give/uacares

REMINDER: Donors contributing through payroll deduction or by credit card using paper forms must include a signature, or their forms cannot be processed.

WHERE TO FIND A PLEDGE FORM:

- Pledge Online Through UAccess – Payroll deduction only!
  UAccess Employee → Self Services → Payroll and Compensation → UACares or
- Pledge forms are available on the UA Cares website: Fill form out on your computer, print out and return to your department coordinator.
What Do I Need To Know About Online Giving through UAccess?

The two most important things to know about online giving are:

- Online you are able to submit payroll deduction gifts for any number of pay periods you choose. To submit a one-time gift by check or credit card, you need to submit a paper pledge form.
- After you submit online, you will not be able to log back in to change your pledge amount. To make changes or ask a question, contact Sheila McGinnis at 626-4671.

What Do I Need To Know About the Paper Pledge Form?
Fillable PDF Pledge Forms

Fillable pledge forms can be downloaded at: http://www.uacares.arizona.edu/ways_to_give. As a coordinator, you may choose to print the pledge forms and personally hand them out.

How do I turn it all in?

Coordinators are given two auditing envelopes: One for the United Way of Tucson and Southern Arizona and one for the University of Arizona Faculty & Staff Campaign (through UA Foundation). You are asked to separate forms along the dotted line and place them in the appropriate envelope after collection (see page 11).

For each envelope you will need to record the number of pledges by type (check, payroll deduct, and credit card), the total amount of money pledged per category, and your contact information. Please sign and date the envelopes as they are official campaign records.

Envelopes can be returned at any designated drop off point. See Important Campaign Dates (page 4). Please do not send your forms to Payroll or through campus mail. If you are unable to drop off your envelope and have missed the drop off days, you may arrange to drop off your envelope by calling the UA Cares office at 626-4671.
The University of Arizona 3 Easy Ways to Give!

1. Payroll Deduct  □ I WOULD LIKE MY GIFT TO BE ANONYMOUS  □ I GAVE ONLINE!
   I authorize payroll deductions of □ $_____ per pay period  □ $20 per pay period  □ $10 per pay period  □ $5 per pay period
   □ Fiscal (24 pay periods)  □ Academic (18 pay periods)  □ Other # of pay periods ______
   (MAX. 24)

2. Check  I have enclosed a check for $__________ (Please make your tax-deductible check payable to UA Foundation)

3. Credit Card  To make your gift by credit card, please go to www.uafoundation.org/give/uacares
   My Gift Is Designated To:
   * Double Your Gift! An anonymous donor has pledged $40,000 to match, dollar-for-dollar, gifts through UA Cares to the Arizona Assurance Endowment. Every $1 you donate to the Arizona Assurance Endowment will be worth $2.
   □ UA Employees Emergency Fund  20-10-2005...Amount $______________
   □ Arizona Assurance Endowment  40-11-6552...Amount $______________
   □ Other...Amount $______________
   (REQUIRED - Please specify Foundation fund account name and number.)
   My gift is not being directed to an account from which I benefit and on which I am the authorized signer.
   *If designation is not indicated, gift will go to Arizona Assurance Endowment.

Signature (Required)__________ Date__________

United Way of Tucson and Southern Arizona – 3 Easy Ways to Give!

1. Payroll Deduct  □ I WOULD LIKE MY GIFT TO BE ANONYMOUS  □ I GAVE ONLINE!
   I authorize payroll deductions of □ $_____ per pay period  □ $20 per pay period  □ $10 per pay period  □ $5 per pay period
   □ Fiscal (24 pay periods)  □ Academic (18 pay periods)  □ Other # of pay periods ______
   (MAX. 24)

2. Check  I have enclosed a check for $__________ (Please make your tax-deductible check payable to United Way)

3. Credit Card  # Exp. ______ Amount $__________
   Billing address required for processing. Your credit card statement will show a charge to United Way. By completing and returning this form you authorize United Way to charge your account for the amount specified.

Select where your gift will be invested  (please see back of form for details)
   □ Community’s Impact Fund (addressing our communities most pressing needs)...Amount $__________
   Impact Areas  □ Education □ Income □ Health
   □ Helping the Working Poor Fund
   (Your gift may be eligible for a state tax credit - consult your tax advisor for more information)...Amount $__________
   □ Other  (IRS Qualified Non-Profit 501(c)(3) Agency or Agencies)...Amount $__________

Signature (Required)__________ Date__________
### Sample - UA Foundation Return Envelope

![Image of UA Foundation Return Envelope]

### Table - Number of Employees Giving in Each Category

<table>
<thead>
<tr>
<th>Category</th>
<th>Number of Employees Giving</th>
<th>Total Amount Contributed Per Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHECKS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CREDIT CARDS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAYROLL DEDUCTIONS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL (For this envelope only)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All Pledges/Gifts
Verified by: __________________________ Date: __________

☑ UA Cares Department Coordinator
☑ University Development Officer
☐ Other: __________________________

Are these department pledges final?
☐ Yes ☐ No

THE UNIVERSITY OF ARIZONA FOUNDATION
Marvin D. “Swede” Johnson Building • 1111 North Cherry Avenue • Tucson, Arizona 85721

### Sample - United Way Return Envelope

![Image of United Way Return Envelope]

### Table - Number of Employees Giving in Each Category

<table>
<thead>
<tr>
<th>Category</th>
<th>Number of Employees Giving in Each Category</th>
<th>Total Amount Contributed per Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit Cards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Payroll Deductions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bill Direct</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL (for this envelope only)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All Pledges Verified By: __________________________ Date: __________

☐ UA Cares Department Coordinator ☐ United Way Campaign Representative

United Way of Tucson and Southern Arizona
330 N. Commerce Park Loop, Suite 200
Tucson, AZ 85754-8790
520.903.9000 / 520.962.9002 fax

Please direct any questions to the United Way Campus Representative at 520.962.9068
FUN WAYS TO PROMOTE PLEDGING

Don’t Forget!
Pass out pledge forms with a clothes pin/thumbtack...or any creative way to make pledge forms seen by the staff person.

Horse and Pony Show
Visit your colleagues and offer them information on how their hard-at-work pledge will benefit the community...offer a treat in exchange for a completed pledge form of any amount!
Reverse Trick-Or-Treat

Celebrate Halloween with a giving spirit!

Dress up and go office-to-office presenting yummy treats for a completed pledge form.

Pledge for Jeans

Designate a Jeans Day for all those who submit a pledge form!

And the Winner Is…

Use completed pledge forms as drawing tickets for prizes. Reach out to the community
for fabulous prize donations.

More Coffee Please!
Each week, pull a completed pledge form out of a hat. The winner gets personal coffee service for the day.

VOLUNTEERING

United Way of Tucson & Southern Arizona Days of Caring
Wednesday, November 4
or Saturday, November 7
You choose time slot and where you’d like to help!

United Way of Tucson and Southern Arizona’s Annual Days of Caring— is the community’s single largest volunteer event. Every year, thousands of people from area businesses, schools and community groups lend their time, talents, and energy to volunteer for projects that make a difference in our community. We invite you to be part of the change. Select a project and VOLUNTEER. Questions about Days of Caring? Contact daysofcaring@unitedwaytucson.org.

HopeFest
9AM-2PM
KINO STADIUM
2500 E. AJO WAY
Friday October 23, 2015
or Saturday, October 24, 2015

For 21 years, HopeFest has devoted its energy to passionately serve the hungry, needy and under-represented members of our community. Find out how you can contribute to the future of someone in need through donations and time. Hope Fest last year served 20,000 needy Tucsonans at the Kino Stadium. Hope Fest provides over $1.5 million dollars of goods and services on one day. This includes medical and dental service.
services, groceries, clothing, haircuts, diapers, personal care items, and many service and program connections for ongoing care. They can handle a lot of volunteers! For more info visit: http://www.hopefest.com/

Sample Dean/Department Head Letter
(Available at www.uacares.arizona.edu/coordinator_info)

<<Date>>

MEMORANDUM

To:
From:
Subject: UA Cares Campaign for Community Giving

The 2015 UA Cares campaign is right around the corner! This is a time when University employees have the opportunity to donate to a myriad of funds here at the University and to non-profit initiatives throughout the community. The campaign has successfully partnered with the UA Foundation and the United Way of Tucson and Southern Arizona over the past twelve years. During that time, employees have made a real difference in the lives of others by supporting student scholarships, groundbreaking medical research, critical community programs that provide food, health care and housing for our most vulnerable citizens, and much more.

I’m also pleased to inform you of two exciting UA Cares giving options: The University of Arizona Employee Emergency Fund (EEF) provides employees with the opportunity to support colleagues who face an unexpected, temporary financial hardship as a result of sudden illness, a family crisis or a natural disaster. This program is a fantastic avenue for helping colleagues in need.

Another great program is Arizona Assurance Endowment, which provides Arizona residents with financial aid and support services to successfully attain their bachelor’s degree at the U of A. An anonymous
donor has pledged $30,000 to match, dollar-for-dollar, gifts through UA Cares to the Arizona Assurance Endowment.

Or, if you’d like to give to a program close to home, please consider a gift to our very own [Program Name and Designation ID]. [Brief explanation]

[Coordinator Name] is serving as this year’s UA Cares coordinator. She/he will be providing you with campaign information and can be reached at [Phone Number]. [Coordinator Fname] will be happy to answer any questions or address any concerns you have about the UA Cares employee giving campaign.

Our department can make a considerable impact on the university and the community! I urge you to consider making a contribution – a gift of any size makes a difference.

Sincerely,

<<Department Head, Dean, etc>>

Below is a list of areas and programs that colleges or departments might consider highlighting:

- Department or College Student Scholarship Funds
- College Directed Community Service Activities
- Student Initiated Community Service Programs
- United Way Community Impact Areas
- Non-profit organizations doing work specifically relevant to your area
Best Practices

The United Way and UA Foundation follow the highest professional standards for donor confidentiality. In order to ensure transparency in our fundraising activities while honoring donors’ demand for confidentiality, the University of Arizona Foundation and the United Way of Tucson and Southern Arizona will not provide individual gift reporting information. Both organizations will provide summary information for departments. Both organizations also request that UA Cares department coordinators utilize the utmost discretion in maintaining donor confidentiality when collecting paper pledge sheets.

Department Campaign Information Available to Coordinators

The UA Cares campaign administrators will provide UA Cares coordinators and departments with the following information regarding departmental campaign results:

- Total number of department’s employee gifts
- Total dollar amount of combined gifts
- Breakdown of total number of gifts and dollar amount for United Way and UA Foundation
- Number of employees who participated from the department
It should be noted that University of Arizona development officers have access to donor information for donations to their particular area of responsibility only. This allows for appropriate gift acknowledgement.

FREQUENTLY ASKED QUESTIONS

What is UA Cares? UA Cares is a University of Arizona workplace giving initiative providing employees with the opportunity to support UA services and programs and the broader community. Through UA Cares, employees can give to any 501(c)(3) non-profit organizations or Community Impact Areas through the United Way of Tucson and Southern Arizona, or to any University program and service through the UA Faculty and Staff Campaign.

Why should I support the campaign? Supporting the campaign means making a difference in our communities... feeding families, giving the gift of education, providing mentoring for our youth or helping to fund vital medical research. Through UA Cares, employees can give to a Community Impact Area through the United Way of Tucson and Southern Arizona, and/or ANY nonprofit organization(s), and/or to any area of the University through the University of Arizona Foundation.
Do I have to choose between giving to the United Way and giving to the UA?
No. You can designate whatever amount you want to each.

If I make my gift by check, do I have to write two checks?
Yes. Because the United Way and University of Arizona Foundation receive, record, and acknowledge gifts through separate accounting systems, two separate checks are necessary.

If I want to give to a non-profit agency that isn’t a United Way partner, how can I do that?
There is a line for write-in agencies on the pledge form, and there are several lines for write-ins on the online giving system. Your gift will go where you designate, minus an 11-percent administrative fee collected by the United Way of Tucson and Southern Arizona. When you contribute directly to United Way of Tucson and Southern Arizona’s Community Impact Fund, it allows United Way to make the greatest impact in the community. Through United Way’s unique ability to multiply your investment, they are able to secure state, local, and federal grants along with volunteer support allowing them to allocate resources where they are most needed. Every dollar invested is equal to $5.66! Donors wishing to give to more agencies, areas or programs than they can list on the paper pledge form, may attach a sheet with additional designation information to their personalized form. Additional designations must include the total amount that the donor intends to give to each additional area.

If employees give their money to the UA, won’t that reduce the amount of money that goes to the community through United Way?
It is unlikely. These two campaigns have co-existed for many years. Coordinating them simply means that employees can make all their donations in a single transaction instead of having to participate in two separate campaigns.
Why should I give to the UA when it is a public University?
Contrary to common perception, the University is not a state-supported institution. It is only state-assisted, receiving less than 20-percent of operational budgets from the state on an annual basis. The remainder must come from other sources and private support is crucial.

How can I make a pledge?
You can make a pledge by filling out the pledge form sent by email to you by your campaign coordinator on your computer. Pledge forms can be used for payroll deduction gifts, and one time cash and credit card gifts to the United Way. Pledge forms can be submitted for payroll deductions, cash or check to UA Foundation. If you wish to give to the UA Foundation by credit card go to www.aufoundation.org/give/uacares. OR you can submit payroll deduction gifts online by going to UAccess – Self Service – Payroll & Compensation – UA Cares. By following instructions on the UA Cares option, you may give through the UA Foundation, the United Way or both.

What is the administrative cost of my donation?
Through the United Way of Tucson and Southern Arizona, 11-percent of your gift goes to administrative costs. When you contribute directly to United Way of Tucson and Southern Arizona’s Community Impact Fund, it allows United Way to make the greatest impact in the community. Through United Way’s unique ability to multiply your investment, they are able to secure state, local, and federal grants along with volunteer support allowing them to allocate resources where they are most needed. Every dollar invested is equal to $5.66!
Gifts to the UA through the UA Foundation in excess of $5,000 are subject to a 6-percent administrative fee. Gifts below $5,000 are assessed no administrative fee.

If I change employers after making an annual gift through payroll deduction, am I obligated to complete my entire pledge?
No. If you become unemployed or change employers, your payroll deduction will stop automatically. If you wish to continue your pledge through other means, please contact the UA Foundation or the United Way of Tucson and Southern Arizona directly.

Can I give to my own program through the UA Faculty and Staff Campaign?
Certainly; in fact, such gifts are welcome. However, there are significant limitations as to the tax-deductibility of amounts given by researchers to their own projects. Also, you will have to agree that your gift is not being directed to an account from which you benefit and on which you are the authorized signer.

Will I receive a tax deduction for my gift?
In the vast majority of cases, yes. There are certain limitations, however. Please check with your tax advisor.

I am concerned about my personal information being utilized by external agencies.
The Office of Community Relations acts as a liaison between the donor and United Way of Tucson and Southern Arizona. Only the information necessary to process your pledge is released.

**COMPLETING YOUR CAMPAIGN**

- Mark your calendar! The UA Cares campaign ends on Friday, November 20, 2015.
- Collect completed pledge sheets and make sure they have been signed.
• Pledges that are made online should not be included in envelope totals.
• Shred blank pledge sheets.
• Cut pledge sheets along the dotted line! Then separate UA Foundation pledges from United Way pledges and put in their respective envelopes.
• Fill out pledge information on the front of each envelope and sign off.
• Fill out the UA Cares 2015 Event Tracking Fax Back form.

Important Reminder! Confused? Don’t worry! Call Sheila McGinnis at the UA Cares office at 626-4671.

For information about your department’s campaign totals, please contact:
ua-cares@email.arizona.edu
2015 Event Tracking Form

Thank you for your hard work during this year’s campaign. We want to ensure we keep track of all fundraising activities held on behalf of UA Cares. Please take a moment to document any special activities you hosted to help raise funds for either university or community programs.

Department Name:___________________________________________________________

Coordinator/Co-Coordinator
Name:_________________________________________________

Number of Employees:______________ Phone Number:__________________________

Special Event Details

Name of Event:_______________________________________________________________

Date of Event:________________________ Funds raised:__________________________

What organization(s) or program(s) did these funds benefit?
_______________________________________________________________________________________________
_______________________________________________________________________________________________

Did you deliver funds directly to the beneficiary?    ☐ yes    ☐ no

Do you have a receipt from the beneficiary?    ☐ yes    ☐ no
(If yes, please provide a copy of your receipt with this form)

Estimated number of participants:__________

Please provide a short summary of your event:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Please fax form to 621-6259 or email to smcginnis@email.arizona.edu immediately following your event. If you have any questions call Sheila McGinnis at 626-4671. Thank you!