



ROLLOVER CAMPAIGN

WHAT IS A ROLLOVER CAMPAIGN?

A Rollover Campaign takes your employee giving (payroll deductions and billing) from the previous annual campaign and automatically rolls it over to the new campaign including gift amount, type of pledge and any designations, unless any changes are specified by the employee. Any gifts that were made via cash, check or credit card are not eligible for rollover and would need to be made by the employee as a new gift. Any employee always has the option to make changes to their gift including an increase, decrease or other adjustment based on their personal situation.

WHAT STEPS ARE INVOLVED?

- Complete and submit the confirmation form on the next page providing us with all the details needed to get started.
- Define your timeline for when you want to run your campaign and determine a point person for employees to contact regarding changes to their gifts or renewals for cash, check or credit card gifts.
- Communicate to your employees the details of your campaign and how they can make adjustments.
- Reach out to new employees that have joined since the end of your last campaign. Provide new staff with a United Way packet including a pledge form or appropriate link to pledge online.
- Submit paper pledge forms to your United Way contact for any new employees or changes for existing donors at the end of your campaign.

WHAT TOOLS CAN UNITED WAY PROVIDE?

- **Donor Information:** We will provide a spreadsheet with the details of your previous giving including donor name, amount and designations for ease of answering employee questions.
- **Communication Plan:** We will provide sample communication to help you inform your employees about the campaign as well as answer questions that might come up.

ROLLOVER CAMPAIGN CONFIRMATION

Our company/organization has elected to implement a Rollover Campaign. We understand that this means all employee payroll and bill me pledges submitted for the previous year will be continued flat for this year, including designations, unless otherwise notified by the donor of any changes.

Campaign Year: _____ Company/Organization Name: _____

Campaign Coordinator Name: _____

Email: _____ Primary Phone: _____

Authorized Representative Name & Title: _____

Authorized Representative Signature: _____ Date: _____

Please return confirmation form to Dana Clayton at dclayton@unitedwayncfl.org.