



# ROLLOVER CAMPAIGN

## WHAT IS A ROLLOVER CAMPAIGN?

A Rollover Campaign takes your employee giving (payroll deductions and billing) from 2022's annual campaign and automatically rolls it over to the 2023 campaign, including gift amount, and type of pledge, 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 back of this sheet is a form to provide us with all the details needed to get started.
- **Define your timeline for when you want to run your campaign.** This looks a lot different than a traditional campaign. Right before your campaign, you'll need to communicate to your employees the details and how they can make adjustments. We recommend about two weeks for notification of adjustments to their gift including designations or to increase giving.
- **Determine a point person for employees to contact regarding changes to their gifts or renewals for cash, check or credit card gifts.**
- **Reach out to new employees that have joined since the end of your 2022 campaign.** Provide new staff with a United Way packet including a pledge form.
- **Submit pledge forms to your United Way contact for any new employees or changes for existing donors at the end of your campaign.**

## WHAT STEPS ARE INVOLVED?

- **2022 Donor Information:** We will provide a spreadsheet with the details of your 2022 giving including donor name, amount and designations for ease of answering employee questions.
- **Communication Plan:** We will provide sample communications to help you inform your employees about the campaign as well as answer questions that might come up.



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## ROLLOVER CAMPAIGN CONFIRMATION

Our company/organization will implement a Rollover Campaign for the 2023 Annual Campaign. We understand that this means all employee payroll and bill me pledges submitted for the 2022 will be continued flat for 2023, unless otherwise notified by the donor of any changes.

**Disclaimer:** All Rollover gifts will be allocated to the Community Investment Fund. Individual designations will only be honored if a new pledge form is completed.

**COMPANY/ORGANIZATION NAME:** \_\_\_\_\_

**EMPLOYEE CAMPAIGN MANAGER CONTACT:** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_ **PHONE:** \_\_\_\_\_

**SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

Please return confirmation form to United Way Resource Development Staff:

Rachael Walsh at [rwalsh@uwozarks.org](mailto:rwalsh@uwozarks.org)

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