UNITED WAY
Warren County

ROLLOVER CAMPAIGN

WHAT IS A ROLLOVER CAMPAIGN?

A Rollover Campaign takes your employee giving (payroll deductions and bill at home) from prior annual campaign and automatically rolls it over to the current 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 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, give cash or checks, or begin payroll deduction if new to campaign. We recommend about 2 weeks for notification of adjustments to their gift.
- **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 prior year campaign and those that did not participate in prior campaign.**
  Provide new staff with a United Way packet.
- **Submit pledge forms to your United Way Campaign Account Manager for any new employees or changes for existing donors at the end of your campaign.**

WHAT TOOLS CAN UNITED WAY PROVIDE?

- **Prior Campaign Year Donor Information:** We will provide a spreadsheet with the details of your prior year's giving including donor name, type of gift, and amount of gift 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.

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ROLLOVER CAMPAIGN CONFIRMATION

Our company/organization will implement a Rollover Campaign for the current Annual 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.

COMPANY/ORGANIZATION NAME: _____

EMPLOYEE CAMPAIGN COORDINATOR: _____

EMAIL: _____ **PHONE:** _____

SIGNATURE: _____ **DATE:** _____

Return confirmation form to your United Way Campaign Account Manager or Kali Tissandier at ktissandier@uwwcoh.org.