

ROLLOVER Campaign



tackling poverty
at its roots

We understand everyone's situation is unique and this year's annual United Way campaign might need to look a little different to best meet your needs while still supporting our most vulnerable neighbors. We are offering the option of a Rollover Campaign in place of a traditional one. As always, we appreciate your continued support of United Way of Pierce County.

WHAT IS A ROLLOVER CAMPAIGN?

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

Rollover campaigns cannot be conducted if your account is processed by an employee giving program other than United Way of Pierce County. If your campaign utilizes the eWay portal for donor communication and pledges, conducting a rollover is very simple. If you use paper pledges, PDF fillable or text to give, more preparation is needed in order to transition to a rollover campaign.

TYPES OF ROLLOVER CAMPAIGNS:

Opt-Out (Preferred Method, Most Successful)

A detailed email is sent multiple times throughout the campaign to eligible employees indicating last year's gift, including pledge amount, frequency, and designations. This giving information will automatically continue unless they either contact United Way of Pierce County or their workplace campaign coordinator.

Sample Language of an Opt-Out Email

This year we are making it easy for you to support the campaign. We are hosting a "rollover" campaign option. If you currently donate through payroll deductions, your pledge will automatically continue with the same amount and the same designations as before, unless you change it. To change your pledge amount, designations or cancel your pledge, please also use the log on information below.

Last year your total payroll deduction gift was \$1,200.00.

Last year, your \$41.67 per pay period gift deduction was withheld for 26 pay periods for a yearly total contribution of \$1,200 and designated to United Way of Pierce County- Building Strong Families. The pledge deduction period starts on January 1st and ends on December 31st. To review your designations please log into your secured donor portal.

Opt-In

A detailed email gets delivered to eligible employees that can roll over last year's gift that includes amount, frequency, and designations. A donor must respond to that email confirming that they would like the same contribution to continue unchanged. We will provide a campaign report and documentation to the coordinator.

Sample Language of an Opt-In Email

Please reply with "yes" right now to continue your current gift.

Last year, your total payroll contribution was \$180.

Your per pay period contribution of \$15 was withheld for 12 pay period(s) and was designated as follows:

\$180 to United Way of Pierce County – Basic Needs - \$180.00

Just reply "yes" to keep this all the same

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WHAT STEPS ARE INVOLVED?

- **Complete and submit the confirmation form on page 3 to provide us with all the details needed to get started.**
- Define the timeline when your campaign will run. This is a lot different than a traditional campaign.
- Before your campaign starts, you need to communicate to your employees the details of the rollover campaign and how they can adjust last year's gift information.
- We recommend allowing 2 weeks for notification of adjustments to their gift, including designations or to increase giving to provide donors with clear communication.
- Determine a point person for employees to contact about 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 last campaign. Provide new staff with a United Way packet including a brochure.
- Return pledge forms to your United Way account representative for any new employees or changes for existing donors at the end of your campaign. If the donor fills out a new pledge form, their automatic rollover will be cancelled.

WHAT TOOLS CAN UNITED WAY PROVIDE?

- **Donor Information:** We will provide a spreadsheet with the details of your employees last year 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 and answer any questions that might come up.

Whether your campaign is virtual, in-person or both, we are here to help! Please contact your Donor Relations Officer or email donorservices@uwpc.org as a resource to support your success.

FOR MORE INFORMATION AND IDEAS, VISIT WWW.UWPC.ORG/CAMPAIGN-COORDINATOR-TOOLS