

ROLLOVER CAMPAIGN INSTRUCTIONS



To our incredible ECCs, THANK YOU for all you do on behalf of your company United Way campaign. We couldn't do the work in our communities without your help.

If your organization chooses to do a ROLLOVER CAMPAIGN, we have here step-by-step information to help you through this process. A ROLLOVER CAMPAIGN occurs when a traditional campaign with an in-person kickoff, employee meetings, and face-to-face asks is not feasible. The employees who are currently donating via payroll deduction will be asked to “rollover” their pledge to continue to the next year.

A ROLLOVER CAMPAIGN can still be fun and exciting! Incentives can still be provided for giving, virtual or in-person events could still occur, and your Campaign Coordinator will provide any messaging you may need (posters, stories, videos). As always, your campaign coordinator is there to assist you with anything you may need. We look forward to helping you create a memorable experience for your team.

Step 1: Request an Excel spreadsheet of all your company's current UWSM contributors via payroll deduction from your Payroll department. This spreadsheet should contain donor's first and last names, amount of payroll deduction per pay period, and the number of pay periods per year. This is the list of employees you will be contacting via email and/or letter about the new ROLLOVER campaign.

Step 2: Included in the Campaign Toolkit available at uwsn.org/workplace-campaign, you will find sample emails and letters you can send to your employees which explain how the rollover campaign will work. These documents can be customized by you to make this process as easy as possible.

Step 3: You will want to discuss a campaign timeline with your UWSM Campaign Coordinator, including determining how long you will give the employees to respond (typically 1 week to 10 days). This information will be included in your email and/or letter that will be delivered to those employees who are currently giving.

Step 4: Your Campaign Coordinator will also provide a listing to you of any employees who donated to the campaign via an alternative payment method (paid via cash, check, credit card, or requested direct bill) if applicable. Those employees should receive a customized letter along with a pledge form (paper or PDF versions are available), to see if they would like to pledge again per their method of payment last year OR ask them if they would like to choose payroll deduction for this year's campaign.