

## Purpose

A rollover campaign allows Capital Area United Way to maintain campaign performance from one year to the next. Instead of campaigning to employees who previously donated, employee giving is automatically rolled over from the 2019 annual campaign to the 2020 campaign. The gift amount, type of pledge, and any designations all remain the same, unless changes are specified by an employee. The primary advantage of this kind of campaign is that it provides a strong floor for giving during a year of economic uncertainty. A rollover may be best thought of as an opt-out campaign, rather than an opt-in campaign.

## Corporate Relationship Managers putting the Rollover Campaign into practice

1. Rollover Campaign Confirmation Form
2. The timeline of the campaign to the CEO/LSM during the annual call
3. How to incorporate employees who donated through cash, check, or credit cards into the rollover campaign
4. How to incorporate new employees into the rollover campaign
5. Provide Capital Area United Way materials
6. Talk to the company ECM about the Rollover Campaign option
7. Instead of the ECM asking donors how they would like to continue their campaign, **ask how they would like to continue, and include rollover as an option**
8. Provide the ECM with potential messaging to be used by the CEO/LSM – this should be sent two weeks before the campaign begins (see below)
9. Note that a rollover campaign allows the company campaign to get off to a good start, while practicing social distancing
10. Have HR, Payroll, and the IT department to understand their rolls to execute the rollover campaign – Teamwork if a must!
11. Execute the Rollover Campaign
12. Export a payroll file out of your CRM platform
13. Send a flat file with the donor name, ID, and their per payroll deduction to the company payroll clerk, if we received
14. Send a thank you in a timely fashion

### Example Message from CEO/LSM

“Due to this year’s unusual circumstances, we will be unable to have our traditional Capital Area United Way campaign that helps so many people in need. In order that our community can continue to provide critical services and that United Way can best address the broad and long-term community needs associated with the COVID1-9 pandemic, we would like to rollover your current payroll deduction pledge into the 2021 calendar year. Your pledge and your designations will remain the same as it is right now unless you would like to make a change. Just click here to change your pledge and/or your designations. Thank you for caring and thank you for sharing.”