



ROLLOVER CAMPAIGN

As the world presses pause and we stay at a distance, our community is finding new ways to keep going and come together. Even when we're apart, we remain united in kindness, united in service, and united in hope. With every new challenge, we see our community rise to the occasion. And now - more than ever - we need your help to meet this moment and respond to this crisis and our communities' needs.

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

WHAT IS A ROLLOVER CAMPAIGN?

A Rollover Campaign takes your employee giving (payroll deductions and billing) from 2021's annual campaign and automatically rolls it over to the 2022 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 2021 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 TOOLS CAN UNITED WAY PROVIDE?

- **2021 Donor Information:** We will provide a spreadsheet with the details of your 2021 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 2022 Annual Campaign. We understand that this means all employee payroll and bill me pledges submitted for the 2021 will be continued flat for 2022, 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

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