



About Rollover Campaigns

LIVE UNITED

If your company had a strong campaign last year and you anticipate having restrictions on gatherings for United Way presentations this year, it may be worth considering a Rollover Campaign in which employee payroll deduction pledges simply carry over to the new year. A Rollover Campaign offers a convenient way to continue offering support to the most vulnerable in our community while minimizing time and personal contact.

WHAT IS A ROLLOVER CAMPAIGN?

- Employee payroll deductions and direct bill pledges from 2022's campaign are automatically rolled over to the 2023 campaign UNLESS changes are made by the donor.
- Changes can include: per pay amount, method of pledging (switching from payroll deduction or direct bill to another type), and any donor designations.
- All existing donors must be given an option to make adjustments. Depending on each company's wishes, you can have your employees **opt out** of changes ("if I don't inform you of my desire to change my gift before XXX date, my gift will remain the same") or they can **opt in** ("I am authorizing the company to continue taking the same payroll deduction amount with no changes for the 2024 calendar year").
- Employees who made gifts of cash, checks, or credit card payments during the 2022-2023 campaign are not automatically included in a Rollover Campaign; you may choose to reach out to them separately with a current campaign pledge form option.

HOW DOES IT WORK?

- **Complete and submit the confirmation form on the reverse of this sheet.** United Way will provide you with a spreadsheet that includes donor information from last year, as well as a sample communication that you would send to each donor about this opportunity.
- Select a one-week timeframe between September 18 and December 15, 2023 when you will communicate the Rollover Campaign opportunity to your employees and allow them to make adjustments to their new gift.
- Provide a pledging opportunity to all NEW staff members and anyone who made a one-time gift last year.
- Submit changes on your spreadsheet as well as new pledge forms to United Way and to your Payroll Department at the end of the designated week.

Although Rollover Campaigns may save time, they do limit the information-sharing that benefits your employees when you conduct a traditional campaign. And they often result in a reduced overall campaign result. They are designed to minimize significant pledge losses from not conducting a campaign at all.

For more information about Rollover Campaigns, please contact us at Campaign@uwlanc.org or call 717.824.8121.

2023-2024 Rollover Campaign Confirmation

Our company / organization will implement a Rollover Campaign for the 2023-2024 Annual Campaign. We commit to the following actions:

_____ Select a one-week timeframe between Sept. 18 and Dec. 15 to communicate the opportunity to all of our previous donors who used payroll deduction last year

_____ Offer the opportunity for donors who used a one-time payment option last year to participate again this year

_____ Offer the opportunity for participation to any potential new donors who did not participate last year

_____ Provide any payroll deduction updates / changes on your spreadsheet (including amount updates, declines for participation, and designation changes) to United Way AND YOUR PAYROLL DEPARTMENT after you have offered this opportunity to employees

Company / Organization Name: _____

Address _____

Authorized By: _____

Email: _____ Phone: _____

Signature: _____ Date: _____

Please return completed form to Campaign@uwlanc.org or mail to

United Way of Lancaster County
Attn: Campaign
1910 Harrington Drive, Suite A
Lancaster, PA 17601

United Way of
Lancaster County

