



ROLLOVER CAMPAIGN

As the world pressed pause and we stayed at a distance, our community has found new ways to 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 respond to the community's needs.

Because workplaces look different, 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 Santa Cruz County.

WHAT IS A ROLLOVER CAMPAIGN?

A Rollover Campaign takes your employee giving (payroll deductions) from 2021's annual campaign and automatically rolls it over to the 2022 campaign, including gift amount, type of pledge, and any designations 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 2 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 and brochure.
- **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 to ease answering employee questions.
- **Communication Plan:** We will provide sample communication to help you inform your employees about the campaign as well as answer questions that might come up.



United Way
of Santa Cruz County

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ROLLOVER CAMPAIGN CONFIRMATION

Our company/organization will implement a Rollover Campaign for the 2023 Annual Campaign. We understand that this means all employee payroll gifts submitted for the 2022 campaign will be continued flat for 2023, including designations, unless otherwise notified by the donor of any changes.

COMPANY/ORGANIZATION NAME: _____

CAMPAIGN COORDINATOR CONTACT: _____

EMAIL: _____ **PHONE:** _____

SIGNATURE: _____ **DATE:** _____

Return confirmation form to:

Dawn Bruckel

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