

ROLLOVER CAMPAIGN INSTRUCTIONS

Choose a rollover campaign when a traditional campaign—with an in-person kickoff, employee meetings, and face-to-face asks—isn't feasible. Through a rollover campaign, you'll ask employees who currently donate via payroll deduction to "rollover" their pledge to continue through next year.

You can still have a fun and exciting rollover campaign! Provide incentives for giving, host engaging activities or events, offer team building through volunteerism, and more. If you need any help creating a memorable experience for your team, contact your [United Way Account Manager](#).

Follow the instructions below to get your organization's rollover campaign started.

Step 1: Request an Excel spreadsheet from your payroll department with Heart of West Michigan United Way contributors who currently give via payroll deduction. The spreadsheet should include donors' first and last names, payroll deduction amount per pay period, and the number of pay periods per year. These are the employees you'll contact about the new rollover campaign.

Step 2: Visit our [Campaign Resources page](#) for sample messaging (e.g., emails, letters, posters, stories, videos, etc.) you can customize and send to employees to explain how the rollover campaign works.

Step 3: Discuss your timeline with your United Way Account Manager and decide on a cutoff date for employees to respond (typically one week to 10 days). Include this information in your communications to employees who currently give.

Step 4: If applicable, create a list of employees who donated via an alternative payment method (i.e., cash, check, credit card, or direct bill). Send these employees a custom letter along with a pledge form (both paper and PDF are available), and ask if they'd like to pledge again using last year's payment method or if they'd like to choose payroll deduction this year.

Step 5: Create messaging for employees who don't currently contribute to United Way and provide pledge forms. This allows new employees, or those who may have stopped giving, the opportunity to participate in the campaign and support their community.

Step 6: Once you've sent employees all information, set a follow-up date to remind everyone to respond with their pledge (3–5 days after the initial communications).

Step 7: On your campaign's closing date, update the spreadsheet with employees who are rolling over their previous year's gift and those who changed their pledge amount. Remove employees who stopped their payroll deduction. For new pledges, create a section in the spreadsheet for these donors, send United Way the original pledge forms, and make copies of the forms for your payroll department. In addition, provide copies of communications from employees with their intentions for audit purposes.

Step 8: Your United Way Account Manager will help you wrap up your campaign and reconcile campaign information. We may ask you to provide all information electronically (if possible), or we can arrange for delivery/pickup of your campaign materials. Once received, we'll enter your information into the pledging system.