

Rollover- 'How To' Guide for ECCs

Rollover is a great option for most companies this year!

Here are the steps you need to complete a successful rollover:

1. Complete the Rollover form and return to United Way. United Way will send company list of 2019 donors.
2. Have CEO send out first email to employees about rollover. See template below for reference.
3. ECC will then follow up with communication to your associates that their payroll deduction will automatically rollover for the 2020/21 campaign. All associates have the option to opt-out, or make changes to their gift. A number of our companies are communicating a "window of time" that they can make changes to their gift (i.e. similar to how benefits work in the fall).
 - a. See below for an email template that corporate partners send to their employees about rollover existing pledges. They've communicated this new plan via email, mailers, and HR reps. They are treating it like open enrollment for annual benefit renewal. The company has identified several points-of-contact within their companies (usually someone in HR) if someone wishes to stop or make changes to their pledge (they can also do this online).
4. The donor makes the change if they wish to opt-out, so no documentation is needed. As for communications, it varies by company. A number of our campaigns have United Way chairs within their company and they are the ones who run the campaign: emailing communications, holding meetings, etc.
5. Once campaign is complete, send United Way excel document of all donors, their information and 2020 pledge amount.

Email Template from CEO to Employees

At (Company Name), we've earned a reputation for caring about the community where we live and work. Every year, we get the chance to demonstrate that community spirit and leadership by taking part in the United Way campaign.

As CEO of (Company), I am very proud of our company and its employees for helping to make our community better. We want to continue that tradition but because of the need for safe distancing this year we have decided to offer a continuous giving option to our team members. For the 2020 campaign we can extend your existing payroll deductions unless a donor opts out or wishes to make a change in their current pledge amount.

Your gift will continue to have the same impact in our community and United Way and their partner agencies will continue to change lives in the Chattahoochee Valley.

I hope you join me and continue your pledge to the 2020 United Way Campaign. If you have any questions, please feel free to reach out to this year's campaign coordinator _____ or feel free to call me.

Thanks!

Email Template from ECC to Employees

Subject Line:

For Your Consideration – United Way Annual Campaign Option

Copy:

Dear COMPANY Team | HR Director | Etc.]:

As our Employee Campaign Coordinator for our annual United Way campaign, I am honored to be in a role that supports such an important mission, especially during these unprecedented times.

COVID-19 is taking a heavy toll on our local nonprofits and thousands of families who rely on critical programs. Your support of our United Way campaign funds critical programs that support local people year-round and enables these emergency-driven activities when our community is in crisis. Our community needs your support now more than ever!

We are making it even easier to renew your United Way pledge this year. If you are currently giving to United Way via a recurring payroll deduction then you will be auto-enrolled in the campaign, giving the same amount as last year.

This does not impact associates giving one-time gifts or other payment options (cash/check)

You can change your 2020 pledge at any time during the pledge period by completing an updated pledge card (paper or digital which ever applies based on company).

**** I understand that if I do not take action that my 2019 pledge amount will rollover and auto-renew as my 2020 pledge. Any specific agency designations will remain the same. Please note that 2020 pledges will not be deducted until the 2021 payroll.**

As always, our partners at United Way are flexible and are willing to work with us to best address our needs. Thank you so much for the opportunity to serve as our United Way campaign coordinator. Even during these unusual times, this has been a rewarding experience that will enable me to rally our employees to come together to give back.

If you should have any questions about your United Way pledge, please contact **COMPANY COORDINATOR NAME AND CONTACT INFO.**

Sincerely,

SENDER