

ROLLOVER

We understand that everyone's situation is unique and Rollovers allow employees to automatically continue to give, especially for those employers who prefer virtual campaigns. As always, we appreciate your continued support of United Way of San Joaquin County.

WHAT IS A ROLLOVER CAMPAIGN?

A Rollover Campaign takes your employee giving (payroll deductions and billing) from the previous year's campaign and automatically rolls it over to the current 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

For more information about United Way of San Joaquin County call 209-469-6980 or visit unitedwaysjc.org



WHAT STEPS ARE INVOLVED?

- Complete and submit the rollover form. Attached to this packet is the rollover form to provide us with all the details needed to get started.
- 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 previous campaign. Provide new staff with an online pledge form and marketing materials.
- Remind employees to submit an United Way online pledge form for any new employees or changes for existing donors.

