



# Retirees Make a Difference for United Way

Statistics show that retirees give a much larger portion of their income to charity than the national average — 4.5% to 7% compared with about 3% for the general population. United Way of Greater Rochester's Retiree Program provides your former employees an opportunity to remain active in their community through their donations and their volunteer time.

## Benefits of a Retiree Program

### For employer:

- Serve retirees by helping them remain active in our community
- Enhance image of company as a dedicated member of the Greater Rochester community
- Continue high-level campaign contributions

### For former employees:

- Opportunity to remain active in or begin volunteer projects
- Continue support of programs important to the entire community
- A chance to remain identified with the company they have been loyal to during their career
- Availability of automatic pension deduction to make giving easy
- Remain informed about United Way programs and community needs

### For United Way:

- Helps to remain connected to our longtime supporters to keep them engaged in community issues and solutions
- Helps offset the financial losses incurred through the cancellation of employee pledges due to retirements, terminations, layoffs, etc.
- Stimulates former employees to volunteer their services to United Way and its service providers because of their increased knowledge about the services and programs provided.

## How to Start a New Retiree Program

- Train your Benefits Counselors on running a pre-retirement campaign. United Way staff members are available to help develop and present information.
- Solicit retirees during exit interview or before the employee leaves, using assembled Retiree Folders with a personalized pledge form and CEO/Retiree endorsement letter.
- Provide a pension deduction plan to make giving easy (call your United Way staff representative for details.)

## How to Run a Post-Retirement Program

- Campaign Coordinator can run a post-retirement campaign as part of your annual employee campaign
- Appoint a Retiree Program Committee made up of retirees
- Identify your retirees
- Organize incentives, special events and recognition for retiree campaign
- Send a letter with a personalized pledge form to retirees inviting their participation
- Provide a pension reduction plan to make giving easy (if applicable)
- Follow up to remind them about the program
- Thank donors and committee members

## Alternative Retiree Campaign

If you are unable to solicit retirees or start your own in-house program, please provide United Way with a list of retirees that we may reach out to. United Way volunteers will contact them at their homes to try to re-engage them in community giving.



United Way  
of Greater Rochester

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## Retiree Campaign Checklist

- Seek the involvement and endorsement of your Chief Executive Officer or leadership team
- Ask management about the availability of automatic pension deduction to make giving easier (if applicable)
- Establish a campaign timetable that complements regular employee campaign schedule
- Involve retirees. Recruit a retiree chair and, if possible, form a retiree committee to work on the campaign
- Develop a retiree campaign message and strategy
- Set a retiree fundraising goal that is separate from your company's goal
- Order campaign literature from United Way
- Identify all retirees
- Personalized pledge forms are available from United Way — order through your relationship manager
- Organize incentives and/or special events, and recognition for the retiree campaign
- Mail the endorsement letter, along with a retiree pledge form, United Way brochure, information on incentives and a postage-paid return envelope
- Promote the campaign through in-house newsletters or retiree bulletins
- Include retirees in special events and other employee campaign activities
- Follow up on outstanding pledge forms
- Turn in final gifts/responses/pledge forms
- Report results to the CEO, United Way and retirees
- Thank and recognize key retiree campaign volunteers and contributors