

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.

INVEST. CONNECT. SERVE.



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

Thank you for connecting with your retirees to build a better Greater Rochester with United Way.