

LIVE UNITED™

Retirees Make a Difference

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 Former Employer:

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

For Former Employees:

- Opportunity to remain active in or begin volunteer projects
- Continue support of programs important to 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

For United Way:

- Helps offset the financial losses incurred through the cancellation of employee pledges due to retirements, terminations, layoffs, etc.
- The Retiree Program has proven successful in increasing the number of contributions to the United Way campaign.
- It can stimulate former employees into volunteering their services to United Way and its service providers because of their increased knowledge about the services and programs provided.

How Do You Initiate A Program?

These are the steps to start both a Pre-Retirement and Post-Retirement Program:

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, 585-242-6400).

POST-RETIREMENT PROGRAM

- Campaign Coordinator runs a post-retirement campaign as part of your annual employee campaign.
- Provide a pension reduction plan to make giving easy.
- 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.
- 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. Providing United Way with an annual update of all retirees maximizes involvement of our retiree population.

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RETIREE CAMPAIGN CHECKLIST

- Seek the involvement and endorsement of your Chief Executive Officer
- Ask management about the availability of automatic pension deduction to make giving easier
- 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 the United Way
- Identify all retirees
- Personalize pledge forms available from United Way
- 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

RETIREE PACKET ORDER FORM

Date: _____

Name: _____

Title & Department: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____ Phone: _____

• Delivery Service/Mail

• Staff Will Deliver

Campaign Associate _____ ext. _____

Number of Retiree Packets requested: _____

Packets include: Contributor Brochure and Retiree Pledge Form

Number of Report Envelopes requested: _____

Other Items Requested: Item Description Order Number

Item Description	Order Number
_____	_____
_____	_____
_____	_____
_____	_____

PLEASE RETURN THE COMPLETED FORM TO:

Marge MacDuffie

United Way of Greater Rochester

75 College Avenue

Rochester, NY 14607

(585) 242-6490

FOR OFFICE USE ONLY

Date completed _____

_ Mailed _ Delivered By: _____ Other: _____