

YOUR RETIREE CAMPAIGN CAN MAKE A DIFFERENCE

Today's retirees are relatively prosperous, vibrant and may still feel a strong allegiance to their former workplace and to United Way. Many retirees participated in and contributed to the campaign for years before they retired.

Retiree campaigns help keep retirees feeling like they are part of the organization. They also have the added advantage of being easy to run. The most successful retiree campaigns simply involve letters signed by and followed up on by a prominent retired person from the organization. Many retirees do not currently contribute only because they haven't been asked. Results show that including retirees as part of your campaign can provide an added source of revenue, volunteers and enthusiasm.

Top ten tips for success

These ten tips are designed to assist you, as Employee Campaign Chair, and your Retiree Chair with planning, executing and wrapping up a successful retiree campaign.

1. **Select and recruit your Retiree Chair.** Choose a respected and highly recognized person who has retired from your organization. Many organizations have a retirees' club with a president. If the president is unable to be the Retiree Chair, they could probably recommend someone for the role.
2. **Connect with your United Way staff partner.** They can provide you with brochures, paper pledge forms and tailored advice on how best to run your retiree campaign.
3. **Your Retiree Chair should participate as an active member of your organization's campaign committee.** If you are running a retiree campaign for the first time, confirm with your organization's Human Resources department if retirees have the option of deducting their United Way donation from their pension remittance.
4. **Develop a retiree campaign plan.** Your plan should include a goal (financial and/or participation), timeline and communication strategies. Include information about your United Way campaign within existing communication channels such as your retirees' club newsletter and the alumni section of your organization's website.
5. **Produce solicitation letters from the Retiree Chair on your organization's letterhead and mail to your retirees.** Your United Way staff partner can provide you with a sample retiree letter for your customization and signature and can also assist with coordinating the mailing. Your organization's Human Resources department can provide you with a complete list of retirees with home address information for mailing.
6. **If your organization's retiree club hosts luncheons or meetings throughout the year, include your United Way campaign as an agenda item during one of these events.** Your United Way staff partner can arrange for a campaign speaker to present United Way's case for support to your retiree audience. As an alternative, you could invite your retirees to attend your organization-wide United Way campaign kick-off event.

7. **Determine whether it is most appropriate for retiree donations to be sent to your Retiree Chair, your organization's office or directly to United Way's office.** If retiree donations are not being sent directly to United Way, ensure that you monitor and report results to your United Way staff partner.
8. **While the campaign is underway,** follow-up with retirees who have not yet donated to encourage their support and answer any questions they may have. Your United Way staff partner can assist in following-up with retirees who are past donors. Remember to include the retiree donations in your overall campaign totals.
9. **Ensure that retired donors receive appropriate thanks and recognition.** Recognition can include a thank you letter from the Retiree Chair, a message on your organization's website and/or a presentation at your next retirees' club event.
10. **Evaluate the retiree program at the end of the campaign and provide your recommendations for future years.**

Pension deduction: Just as easy as payroll deduction

Retired employees will like the fact that they can pledge their support to United Way and pay just as they always have—through an easy deduction plan.

Your accounting department or pension fund manager can help you set up the pension deduction plan. In addition, cheque and credit card donations are always welcome. Your retiree campaign can make an important difference to your employee workplace campaign and to United Way.

Please note: There is a possibility that United Way is already soliciting some of your retirees as part of our Direct Response program. We encourage you to bring these cases to our attention in order to eliminate duplicate mailings in the future.