

## 4.4 Retiree Engagement – RETIRE UNITED

United Way needs your help to track and retain retirees! We want to stay in touch with donors when they leave your company. You know your workplace best; let us know how we can continue outreach.

Here are some ideas:

- Include the HLUW retiree brochure in the exit information packets
- Publish info about United Way news and events in retiree newsletters
- Send out a retiree letter on behalf of United Way during your workplace campaign

Talk to your HLUW staff representative to get copies of the Retire United brochure, and to share ideas and create a plan!

### Running a Retiree Campaign

#### Phase 1 – Planning

- Involve retirees or retiree groups in planning/solicitation and incorporate their campaign into the company's regular employee campaign.
- Decide whether the retiree solicitation will be through direct mail and print media only or if it will involve a special retiree rally/event/reunion.
- Offer a variety of payment options: automatic bank or credit card payment; automatic deduction from the retiree's pension check; monthly or quarterly billing through United Way's direct bill method; securities gift or cash/check gift. United Way can help you design a special pledge card.
- Retiree gifts will count towards your company's campaign total.
- Give retirees the opportunity to give to Head of the Lakes United Way or to designate to another community where they live now (e.g. Arizona, Florida, or Texas.)

#### Phase II - Communication

- Offer retirees the opportunity to go on agency tours and/or participate in campaign events with company employees.
- Communicate to the retiree that they are a vital individual who is important to the community.
- Personalize the letter, if possible, and send it from a known and respected retiree or from the chair of the campaign. Using larger type for these letters can make reading easier for retirees.
- Supply information on United Way 2-1-1 and volunteer opportunities.
- If possible, offer the same incentives to retirees as to employees.
- Provide a tailored pledge card that reflects their payment options and a pre-paid return envelope.
- Don't forget a THANK YOU with the results of the retiree campaign and company's employee campaign.