

# ENGAGING RETIREES IN WORKPLACE CAMPAIGNS

More Baby Boomers are leaving their workplaces each year. Many of these retirees have supported United Way for decades and stop giving simply because no one asks them! We can provide the support you need to reengage your company's former employees and create a thriving retiree campaign through our affinity group Always United.

**RETIREE  
GIVING  
HELPS  
YOUR  
COMPANY  
CAMPAIGN**

## HOW YOUR COMPANY WINS:

- Boosts your campaign results by including retiree giving
- Shows your company's dedication to improving the Midlands
- Capitalizes on United Way's Always United affinity group as a resource to keep retirees engaged
- Empowers retirees to remain active in the community and stay connected with other retirees
- Creates a positive influence for the new generation of employees to support United Way's mission for long-term community change
- Benefits the local community through supporting initiatives that provide the building blocks for a quality life and stronger community

## WHY IT MATTERS TO RETIREES:

Retirees want to stay connected to their communities and feel valued. These individuals have many skills and abilities that can truly make a difference in our community. Benefits to your retirees include:

**RETIREES  
STAY  
ACTIVE &  
FEEL  
VALUED**

- Membership in Always United to stay connected
- Volunteer opportunities as a way to stay active and feel valued
- Updated Information about how United Way's Community Impact initiatives influence their friends, family and community
- Continued ability to support community initiatives they personally value
- An option to easily give one time or recurring donations by mail, online at [www.uway.org](http://www.uway.org), through a company campaign, a retirement plan or stock gift

## HOW TO RUN A RETIREE CAMPAIGN: 2 EASY OPTIONS

United Way can provide the support you need to connect with your retirees with two easy options,

**OPTION 1:** Run a retiree campaign as part of your company campaign by using a step-by-step plan from Always United

**OPTION 2:** Let us run it for you!

## Option 1: Best practices for running a retiree campaign

A great way to hold a successful campaign is to involve your retirees in the process. Begin by pulling together an Alumni Leadership Team of former employers who contact fellow retirees throughout the campaign. This is how it works:

- 1. Make sure to have administrative support** and buy-in from the CEO.
- 2. Build your Alumni Leadership Team.** Engage your CEO and management team to make recommendations and help build this team of volunteer retirees.
- 3. Plan the campaign.** This includes identifying the target audience with an emphasis on the most recent retirees (from the last 5 years and any former United Way Campaign leaders). Gather contact information for each (name, address, email and phone number) so the Alumni Leadership Team can reach them throughout the campaign. You may consider coordinating the retiree campaign with the company's annual campaign.
- 4. Prepare volunteer training materials** and plan a kickoff event. Break down responsibilities for volunteers so that each team member will make about the same amount of calls or contacts.
- 5. Host a team training event.** Rally your volunteers and get them excited about the campaign. Include an Always United member to encourage the group to support United Way's mission and answer any questions. Help your volunteers understand their responsibilities and how the campaign will unfold.
- 6. Host a retiree kickoff event.** Make this more about connecting your retirees than asking for money. You can provide updates on your business, allow time for networking with former colleagues and even honor a retiree who has been volunteering in the community. Invite an Always United speaker to share why they stay involved with United Way. Include a no-pressure mention of the campaign and let them know they'll be receiving more information by mail or email.
- 7. Send mailing #1.** Include a letter from the CEO and a retiree pledge card.
- 8. Send mailing #2.** Send a simple reminder card about the campaign and how they can participate. You also may choose to reach out via email if you have current addresses. This can be a convenient way for giving online.
- 9. Make follow-up calls.** Have team members make personal phone calls to retirees. During this time, the campaign leader should provide updates to volunteers on the status of the campaign.
- 10. Host a final event.** Invite success! Report results and ask for input to improve next year's campaign.

## Option 2: Let us reach out for you

Sometimes it's more convenient for United Way staff to reach out on your behalf. Here's how this option works:

- 1. Compare donor and retiree information** to ensure United Way has current contact information, which may include home addresses, email and phone numbers. United Way promises to keep this information confidential and will never share with outside sources.
- 2. Determine company assistance** available for matching funds, pension deductions or event funding.
- 3. United Way staff will enlist Always United members** who are company alumni to assist in conducting a campaign and engage other key Always United members to lead a campaign for your group.
- 4. United Way reports progress** and all retiree donations to company.

**Either option can be completed as a virtual campaign, in-person event or a combination of these methods.**

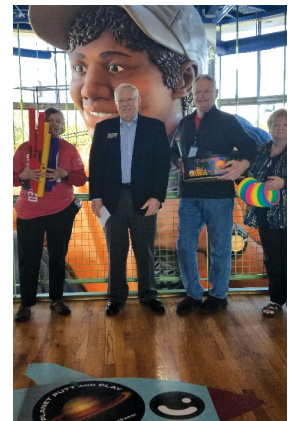
## OTHER HELPFUL TIPS:

- ▶ **Secure matching gifts.** Matches are a strong incentive for people to give. Continue matching retiree giving if that is a tradition in your company. Secure matching gifts from your company and its vendors.
- ▶ **Stress community impact.** This is the most important of all! Anyone who gives to United Way needs to understand the significant impact they can make and feel a connection to the critical work they are supporting in the community. United Way can provide materials and speakers to help you tell the story.
- ▶ **Encourage membership in Always United.** This affinity group is for retirees and late-career employees. There are many ways members can participate – committee involvement, interactive events, personal development and volunteering.

## WHY JOIN ALWAYS UNITED?

**Always Informed:** Always United offers many opportunities to be informed and engaged through activities such as Mentor Match, Community Impact - Behind the Scenes, Tuesday Talks and workshops to build skills. Stay in contact with former coworkers and other Always United members through organization and social functions. Participation may be in-person or through virtual activities.

**Always Active:** Your flexibility and unique experiences allows you to improve the quality of life in the Midlands. Always United provides you opportunities to volunteer your time and talents in a meaningful way. Whether participating on a committee, volunteering with an agency or program you personally value, you will easily find individual and group activities to stay engaged in the community.



**LEARN MORE** about Always United by visiting [AlwaysUnited.org](https://AlwaysUnited.org).