

UNITED WAY  
**RETIREES UNITED**

Draft letter to ECC re: retiree campaign

Dear ECC:

As you begin your planning for this year's United Way campaign, please consider adding a retiree campaign as an enhancement to your workplace campaign.

The retiree population represents a great opportunity for increasing the number and volume of donations to United Way KFLA. To note:

- currently approximately 32% of the Kingston Area population is over 55;
- the over 55 age group donates almost twice as much as the under 55 group; and
- over the next ten years the population growth in Kingston will be in the 65+ age group.

Retiring can be a time of mixed emotions for an employee. Retirees may be apprehensive about losing the social connections with fellow employees, and the connection to the company they had while they were working

The Retiree campaign can be run in parallel with the workplace campaign, by a recent retiree who is a committed United Way donor. As a fellow retiree, they will reach out to the workplace retirees via letter (paper or electronic) to solicit retiree donations that will be added to your campaign total.

A Retiree campaign is also great opportunity to engage your retirees in a social activity while bringing additional awareness to the United Way through a get-together offering agency speakers and/or a Seeing is Believing tour where retirees can see firsthand the impact of their donations in the community

Attached you will find a document detailing the steps to take to ensure a successful Retiree campaign, as well as a playbook for the Retiree Champion who will orchestrate your Retiree campaign.

If you have questions or require additional support, please reach out to your United Way staff partner.

Good luck with this year's campaign!

# UNITED WAY RETIREES UNITED

## Retirees Champion Campaign Playbook<sup>1</sup>

### Purpose

To retain/increase/obtain donations from retired employees

To provide ideas to assist the Retiree Champion in running a retiree fundraising campaign in conjunction with the workplace campaign

### Role of Retiree Champion

- Co-ordinate the retiree campaign in conjunction with the workplace campaign
- Peer Learning /Orientation sessions: volunteers from other workplaces share their tips and tools at this session
- Work in conjunction with the workplace campaign chair(s) to ensure retirees are included in the company campaign events
- Prepare ask letter to retirees; include current print material from the United Way
- Send regular emails to retirees during the campaign to keep them aware of campaign events and results milestones
- Consider a unique event for retirees to come together to socialize and learn more about the work of the United Way
  - Invite an agency speaker to the event
  - Consider a customized Seeing is Believing tour to provide retirees with the opportunity to see the impact their donations have in our community
- Track your progress and results and follow-up where necessary
- Send a thank you letter/email to all donors; in the letter, ensure you mention the opportunity to volunteer if the retiree is interested (provide link to the volunteer section of the United Way website)

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<sup>1</sup> Retiree Champion is assumed to be a recent retiree that is an ongoing donor at the Leader or Friend of the United Way level and has familiarity with the United Way

## **ECC Steps to a Successful Retiree Campaign**

NOTE: As a precursor to a United Way retiree campaign, ensure that as employees retire, HR maintains a spreadsheet of retirees names, addresses and email addresses.

If employee is already a United Way donor, ensure they have the tools to continue to donate (deduction from pension payment, pre-authorized debit, credit card)

It is important to create a distinct retiree component to the workplace campaign in order to ensure ongoing donations from retirees.

### **Step 1: Recruit a Retiree Champion**

Best practice is to recruit someone that meets the following criteria:

- Is recently retired
- Is a contributor to United Way for more than 3 years
- Has volunteered with previous workplace campaigns and/or in the United Way community
- Has a suitable personality

### **Step 2: Educate the Retiree Champion**

- Share the ECC guide/mini-guide with the Retiree Champion
- Provide contact for a United Way Staff partner for information and web links

### **Step 3: Involve the Retiree Champion in Campaign Planning**

- Include the Retiree champion as a member of the campaign team so they are involved and aware of the workplace campaign
- Provide support in the form of drafting the retiree letter, offering any workplace campaign brochures, campaign timelines and/or calendar of workplace events to be included with letter
- Provide tracking of progress and results and assistance with follow-up, if necessary
- Consider reaching out to retirees by both email and letter
- Make it easy to donate; ensure options such as credit card, pre-authorized debit and deductions from pension payment, if available, are included in the ask

**UW Logo**

**Company Logo**

Sample letter for retiree canvass

Month ??, 2020

Dear <<insert name>>:

It is time again for the annual United Way campaign. This year's campaign will continue to focus on **"Local Love"** in our community and investing in our local programs and services. Given the current economic circumstances, your support for United Way is especially important to continue funding critical programs and services for the most vulnerable members of our community. More information about our United Way can be found at [unitedwaykfla.ca](http://unitedwaykfla.ca).

We know many of you are long-time contributors to our annual campaign and in fact, **OUR COMPANY** retirees contributed more than **\$XXXXXX** to the overall campaign results last year. We thank you for your continued generosity and support.

Giving to charity is a very personal decision. If you are new to United Way, consider the following reasons to support our local United Way:

**✚ Giving to United Way is efficient**

With one donation, you can reach many different sectors of your community and address multiple needs. United Way maintains lower fundraising and related administrative costs (12-16% in any year, compared to the average of 35% administration in most charities) so more money gets to where it is needed.

**✚ United Way KFLA support during the COVID pandemic**

Since shutdown started on March 17<sup>th</sup>, United Way volunteers and staff kicked into high gear to ensure funds were available to frontline agencies through this crisis. The United Way KFL&A Covid-19 fund was set up immediately and thanks to the generosity of local donors, over \$300,000 has been raised. United Way was also able to apply for and access funds from the city, and the federal government to invest in local responsive programs.

Additionally, agencies have been adapting existing programs, and creating new programs to help the most vulnerable. In the first quarter of the crisis, 87 grants, totalling over \$1.2 million have been invested in local programs. This was achieved via the efforts of volunteers and staff with responsive actions that balanced accountability, need and speed. In addition, this work was also assisted and implemented by frontline agencies, who work so hard to help people impacted by the COVID crisis.

**✚ Leadership Challenge Grant**

This year a benefactor will generously provide a Leadership Challenge Grant to encourage Leadership level donations. This Grant matches donors who reach the \$1,200 amount for the first time. The Challenge Grant also matches those who have contributed over \$1,200 before and continue this year by increasing their donation by 10% or more.

Every donation makes a difference. The enclosed pledge form details how to give either by a one-time donation, by pre-authorized chequing or by using your credit card. Due to issues arising from COVID-19, we encourage donors on-line (**each workplace to give specific instructions for this.**)

Our workplace campaign will have a component for retirees and those about to retire. . The details are included in an attachment to this letter.

We can show what our Local Love in Action looks like and while we may be apart, we can come together to support our United Way. Our efforts can make a difference in our community. If you have any questions about United Way or our company campaign, please give me a call.

Thank you so much. We look forward to your participation in the Campaign.