

Embracing the Intel Values Legacy

Intel Retiree Organization

The date you've had circled on your calendar for months or maybe a year or two has finally arrived. It's the day you will be retiring from Intel. If you're like most people, you're probably exhilarated by the prospects of taking that long awaited "big" trip or devoting your efforts to that hobby about which you've become passionate. Regardless your time is now yours and maybe for the first time in your life you are not accountable to anyone but yourself. It's exciting.

However, when the glow of being newly retired has worn off, you realize that you are truly on your own to make important life decisions like selecting the best healthcare, insurance options or other financial transition decisions. No longer can you call your HR representative or walk over to payroll to get your questions answered. Also you may realize that you were not just an employee of Intel, but you were also a member of a community with a strong culture. You may miss that connection, especially if you've decided to move away from the area near an Intel site. Who can fill this void? The answer is the Intel Retiree Organization where Intel retirees volunteer to help other Intel retirees along the path of retirement through sharing of their experiences and assisting them as they navigate the retirement journey. Why, you ask? The secret lies in a deep set of values that was never limited to work. Those values continue to drive this group of retirees, and the Intel Retiree Organization uses these Intel values and knowledge to improve the retirement experience.

What is IRO and How Does It work?

The Intel Retiree Organization (IRO) has more than 3500 members. IRO has a Board of Directors and committees for Communications, Health and Benefits, Volunteering, Web Site Development and Strategic Planning. The organization is made up of volunteers who have pioneered the retirement experience for the company.

It provides its members with a web site www.intelretiree.com, which has a wealth of current information that helps retirees answer questions which they may have about healthcare, benefits, discounts, and volunteering. It even has a section, where interesting stories about fellow retirees are posted. This gives them an opportunity to reconnect with former colleagues or just read what others are doing.

Additionally IRO has a dedicated email mailbox for retiree questions and issues, monitored daily by a Communications Team volunteer and supported by documentation on how to deal with questions quickly and accurately. Retiree volunteers show other retirees where they can find either the Intel answer in writing, or provide information about whom to call within Intel for further assistance. Issues are held open until the retiree is satisfied that his or her issue has been resolved.

Also annually IRO sponsors dinners at the main Intel U.S. sites where retirees can meet and listen to a speech from an Intel executive about the activities at the company.

sharing, Caring, Connecting

The IRO Story Begins

From its inception in 2001 as an Oregon/Washington-only alumni volunteer group, the Intel Retiree Organization (IRO) has evolved to its current status of 2887 worldwide members in 2014 and crossed the 3500 mark as we close out 2015.



Our History - The First Chapter

In 2001, the Volunteers of America (VOA) contacted Intel about partnering with retirees to form an Intel branch of VOA supporting one big volunteer project. Intel contacted retiree Laura Good and together they launched the fledgling organization known as the Intel Alumni Volunteers (IAV) that would eventually become the Intel Retiree Organization. Oregon Intel retirees got involved, developed a mission statement and the IAV evolved. It was to be primarily social in nature with quarterly newsletters printed and mailed, keeping Oregon and Washington retirees connected.

ORIGINAL IAV MISSION STATEMENT

To make a meaningful and positive difference in the community through the diverse talents of former Intel employees

Time to Hit The Road



By 2005, the organization got new life as Intel expressed an interest in fostering similar retiree groups in Santa Clara and Arizona. The Oregon contingent went “on the road” at Intel’s expense, putting forth the concept of one big retiree organization, with “satellites” at major Intel sites.

Momentum gathered as retirees began to see the benefits of banding together, learning from each other and sharing retiree priorities with Intel. Leaving Intel had meant cutting off the flow of information and access to key contacts who can help retirees navigate their new situation. There was a problem, and Intel retirees were quick to assume responsibility for finding a solution.

Momentum Grows



The organization added many new members after the “road show” for retirees. A Communications Committee developed quickly and decided to

discuss the possibility of becoming an official Intel *Employee Group*.

Using Intel’s template for Employee Group chartering, the committee created its mission and vision statements, set up channels of communication and decided how it would get work done within the organization. Committees were formed, a board elected and initial decisions were made including how we would work with Intel, and that the organization determined no dues would be required. Intel officially recognized the current organization in 2008 with an Intel Vice President level sponsorship and annual funding.

A Passion and Intel Values Emerge

Using a disciplined and results oriented approach, the newly energized Intel Retiree Organization created action plans to begin to improve the retirement experience for Intel retirees. Starting with an analysis of the current situation and a desired future state (for Intel retirees), gaps were identified. The group then brainstormed a list of programs that could be implemented through their volunteer efforts and with assistance from Intel. The action plan was presented to Intel management and agreement/approval of the plan occurred.

This small group of Intel retirees, who were passionate about helping other retirees navigate the retirement maze, stepped up to create an organization that eases the transition to retirement with specific projects that they achieved with minimal costs. The group’s executive sponsor, Richard Taylor, crystalized the retiree relationship with Intel as being “valued members of the Intel family.”

What Problems to Solve?

Retirees enter a whole new world after leaving Intel. Information that was supplied at retirement quickly became out-of-date, and few contacts remained to find answers from within Intel. If standard Intel retiree processes failed, retirees didn’t know where to go for resolution. Retirees either persevered to find solutions on their own, or gave up in frustration.

In addition, retirees had to make important decisions regarding healthcare and would benefit from shared information from other retirees who had made the decisions before them. Also, retirees had a retirement healthcare fund (SERMA) that could only be used for the Intel Retiree Medical Plan, and many retirees didn’t want to purchase that insurance; they wanted other healthcare insurance options.

The Oregon/Washington IRO group learned that retirees liked to get together for luncheons, volunteer their time helping others and share stories with former friends at Intel. These issues formed the core of the projects undertaken by the Intel Retiree Organization.



Committees Formed

Action plans were driven through the committees for Communications, the Website, Health and Benefits, Volunteering, and Strategic Planning with the board meeting monthly to coordinate the work of the volunteer board and committee members. The organization also designated site representatives for the larger sites. These site retiree volunteers coordinate informal retiree luncheons, an annual dinner and other activities.

Communication Efforts Expand

Coming up with communication channels was a definite need. The IRO enlists multiple channels, including a web site, a monthly newsletter and email blasts for time sensitive information such as disaster response volunteer opportunities.



A database of retiree email addresses ensures a channel to all retirees who have joined the Intel Retiree Organization. The IRO has a dedicated email mailbox for retiree questions and issues, monitored by a Communications Team volunteer and supported by documentation on how to deal with questions quickly and accurately.

Retiree volunteers show other retirees where they can find either the Intel answer in writing, or provide information about whom to call within Intel for further assistance. Issues are held open until the retiree is satisfied that his or her issue has been resolved. The Communications Team meets monthly to stay on top of priorities.

www.intelretiree.com Goes Live

The original IRO web site was accomplished with “creative resourcing” e.g. executed by students taking a web development class, managed by the website committee! It went through major changes in 2011, and through a disciplined, quality-oriented approach, is now an easily maintained site that offers security and flexibility.



The IRO asked for and received the funding necessary from Intel for the software for the website. Volunteers monitor the site and make changes required to keep the information fresh and useful.

Health/Benefits Makes Gains

The Health and Benefits committee took on two issues retirees wanted: (1) to use SERMA funds (an Intel retiree benefit providing a health insurance account based on years of service) to purchase non-Intel plans and (2) more options than just the Intel plan could offer.

In late 2009, the IRO Health and Benefits committee shared its concerns and ideas on these issues with our Intel sponsors. Due to the relatively small pool of Intel retirees, Intel was unable to provide more plan options. However, in June of 2010, Intel announced a major change on how SERMA could be used. Retirees now may use their SERMA to purchase non-Intel health plans that may be less expensive and more customized to their particular needs and situation. For many, this means that their SERMA funds will last much longer.



Now the work of the committee has shifted to sharing healthcare insurance related information from other retirees, about topics such as buying healthcare insurance on the open market or a retiree's options when COBRA ends.

International Involvement



IRO has more limited support for international retirees. Benefits on the website are primarily for U.S. retirees, but International retirees are welcome to join the organization, receive the monthly newsletter, get announcements and have access to the Facebook group and the dedicated mailbox for questions.

The organization also encourages local social events and will help international sites to organize that service if requested. To date, there have not been any requests by International sites to do this.

Our Story Continues

Why was the team of volunteers that created the initial expansion of the organization so passionate? At first it was because they had personally experienced an issue in retirement that required them to work with Intel - and the only way they could get an issue resolved was through calling a friend at Intel. This clearly wasn't going to work for future retirees, it's not scalable and everyone who used to work at Intel may not have connections back at Intel to call. As the team completed the chartering process for Employee Groups at Intel – they realized how much they missed working with Intel-ized people! Utilizing Intel values and experience enabled the group to build the structure that is in place today for support of Intel Retirees as volunteers, this was accomplished when members of the founding Intel Retiree group had never met face to face.

In conclusion, the Intel Retiree Organization is a great example of what can be accomplished when retirees and the company work together. Employees who have always been proud to work for an exceptional company, remain proud to be a “valued member of the Intel family” in their retirement.



THE INTEL RETIREE ORGANIZATION MISSION STATEMENT

To make a meaningful and positive difference for Intel retirees, the Company, our local communities and current employees planning for retirement.

Contributors to Our Story

Researching the history of the Intel Retiree Organization and writing our story was taken on by Debbie Watson, Chairperson of the IRO Communication Committee and Cheryl Pruss, Chairperson of the IRO Health and Benefits Committee. Without their passion and the help from team members, our story would not have been told.