

**NAGDCA 2017 LEADERSHIP AWARD NOMINATION**  
**OREGON SAVINGS GROWTH PLAN**  
**NATIONAL RETIREMENT SECURITY WEEK - GENERAL CAMPAIGN**

**SUMMARY OF PROJECT**

**Overview**

The Oregon Public Employees Retirement System (PERS) and the Oregon Savings Growth Plan (OSGP) are two retirement plan benefits provided by the State of Oregon for its employees. PERS serves the people of Oregon by administering public employee benefit trusts to pay the right person the right benefit at the right time. OSGP is a voluntary 457(b) deferred compensation plan that provides public employees with a supplement to their PERS pension that helps save for retirement. To recognize and celebrate National Retirement Security Week, PERS and OSGP presented Retirement Expo '17 at the Salem Convention Center for all state and local employees to learn about the various benefits of their employment. The event took place on both floors of the Convention Center and its entire ballroom meeting space was utilized for planning workshops and education. For those who are unavailable to attend, PERS and OSGP representatives presented workshops about the plans in 12 cities over seven days during National Retirement Security Week. The collective efforts were aimed to help all Oregon employees retire with confidence.

**Project Objectives and Branding**

Retirement Expo '16 was the State's most successful event to that point. In developing the Expo '17 event, the 12<sup>th</sup> annual, a PERS/OSGP rebranding effort was conducted to more clearly emphasize the connection of the two plans for employees. Doing so helps employees understand the value the pension will have towards the retirement goal, but will likely not be enough to fully replace retirement income. The pre-tax savings made through enrolling in the Oregon Savings Growth Plan would help reduce the gap and make more retirement dreams a retirement reality. As a result of the rebranding, a "Better Together" logo was created and incorporated into all communications promoting the event and featured at the event.



**Better TOGETHER.**

With a new event identity and repetition that Retirement Expo '17 is presented by PERS and OSGP, themes were developed to spark event interest and attendance. OSGP's contracted record keeper, Voya Financial®, helped provide lifestyle imagery to materials through their national "Be Good to Yourself" campaign. The "Better Together" designs and "Be Good to Yourself" themes were incorporated into event materials that built upon the success of previous years while expressing the value of attending 2017's event. Retirement Expo '17 truly offered something for everyone with representatives from PERS, PERS Health Insurance, OSGP, Social Security, Oregon Financial & ID Theft Protection Outreach, investment managers/providers and others. In addition to booths representing these resources, many of them also presented hour-long workshops with information that was critical to their saving strategy and retirement goals.

**NAGCA 2017 LEADERSHIP AWARD NOMINATION  
OREGON SAVINGS GROWTH PLAN  
NATIONAL RETIREMENT SECURITY WEEK - GENERAL CAMPAIGN**

**WRITTEN JUSTIFICATION w/ SUPPORTING DOCUMENTS**



**Project Execution**

Retirement Expo '17 presented by PERS and OSGP was promoted across multiple platforms and communication pieces focused on driving attendance and stressing the importance of saving for retirement. It also raised awareness to the value of participating in the Oregon Savings Growth Plan as a complement to the PERS pension plan in pursuit of retirement goals. The following were developed and distributed for this comprehensive communication and promotion campaign:

- A “Save the Date” flyer mailer
- Event registration microsite
- Event announcement flyer
- Quarterly newsletter
- Branded email banner utilized in all OSGP email communications
- Event promotional kits sent to over 1,000 State and local agencies
- State-wide email sent to over 40,000 employees
- On-site posters
- Promotion at all State Agency Directors and Human Resource/Benefit Managers meetings
- Agenda flyer distributed at all PERS and OSGP outreach events
- “Picture Yourself in Retirement” photo booth activity

In particular, the Agency Kits sent to over 1,000 Oregon locations were a new way to engage attendees directly through their employer. The kit consisted of a letter to the location head, explaining National Retirement Security Week, the Expo event and its importance to interested employees. The letter then asked each location head to take the flyers and posters provided with the kit and post them in prominent work spaces to encourage attendance. The effort brought the Expo to the agency level and created a greater awareness than previous years.

**NAGCA 2017 LEADERSHIP AWARD NOMINATION**  
**OREGON SAVINGS GROWTH PLAN**  
**NATIONAL RETIREMENT SECURITY WEEK - GENERAL CAMPAIGN**



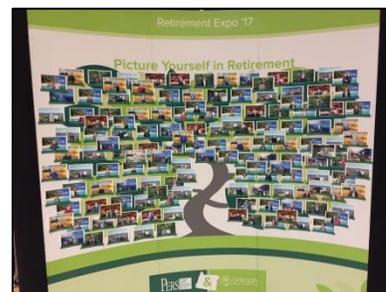
Promotion of the event in familiar and new ways yielded immediate results. Registration for the event opened to employees in July, 2017 and captured over 4,700 pre-registrations before the event. This total was more than double the amount from 2016. Overall, the [growyourtomorrow.com](http://growyourtomorrow.com) event microsite had almost 15,000 page views from over 9,500 unique users during 12,400 sessions in a three month period.

### Event Execution

The Salem Convention Center event was the highest attended Expo to date. From 10 am until 8 pm, State and local employees attended workshops, visited booths, engaged with resources, learned about additional benefits, and were educated on the available options to save more and retire better. They were even able to have a little fun!

### “Picture Yourself in Retirement”

Expo '17 featured an activity that allowed attendees to take a picture in front of a green screen, then select a background that reflected their retirement goals. Options ranged from a tropical island to a cozy cabin to hobbies like golf, gardening or reading. After the background was selected, attendees were given a picture of themselves in that retirement to take with them and an OSGP-branded selfie stick to use in taking pictures when their actual retirement is realized. Almost all 500 selfie sticks available as giveaways for participating in the activity were distributed during event. As the day progressed, the OSGP “tree” logo became covered with a collage of employees sharing their dreams and picturing themselves in retirement.



**NAGDCA 2017 LEADERSHIP AWARD NOMINATION  
OREGON SAVINGS GROWTH PLAN  
NATIONAL RETIREMENT SECURITY WEEK - GENERAL CAMPAIGN**

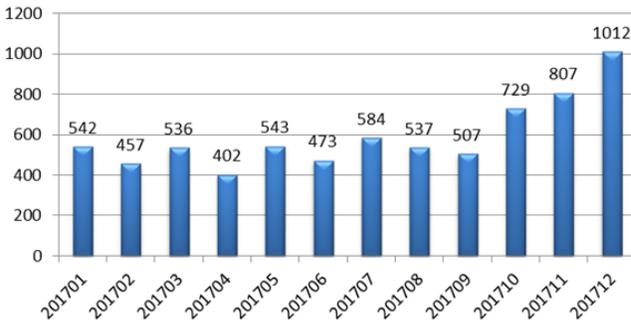
**Results**

Results from Expo '17 as it relates to the Oregon Savings Growth Plan include:

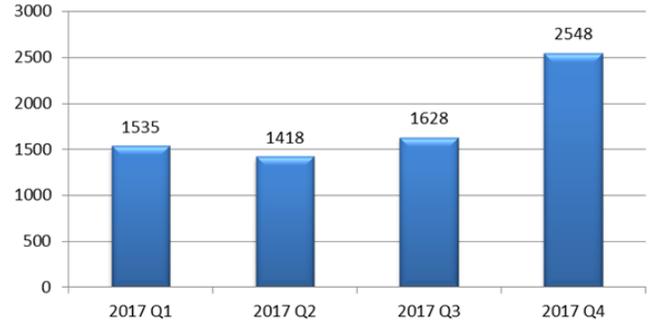
- A 67% increase in deferral changes in Q4 2017 compared to the average changes Q1-Q3 2017.
- 1,846 deferral increases in Q4.
- 614 enrolled or resumed contributing in Q4.
- Increased plan web and mobile traffic in Q4.



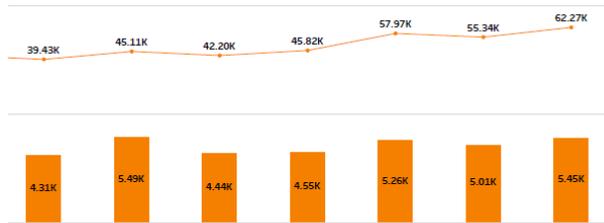
**# Deferral Changes**



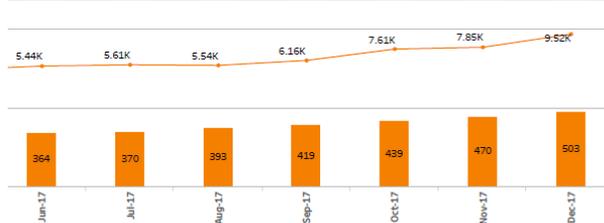
**# Deferral Changes**



**Web Logins**  
# of Logins →  
# of Users →



**Mobile App Logins**  
# of Logins →  
# of Users →



Plans for Expo '18, this year titled "PERS/OSGP Expo '18: Explore Your Financial Future" are already underway. This year's goals will be greater attendance, more enrollment into the OSGP and agenda "tracks" tailored towards those in Early Career, Mid-Career, and Nearing Retirement.

