

**NAGDCA 2019 LEADERSHIP AWARD NOMINATION**  
**THE OREGON PUBLIC EMPLOYEES RETIREMENT SYSTEM AND THE 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 the PERS/OSGP Expo '18 at the Convention Center in Salem, Oregon for all state and local public employees. This is an annual event that provides education about the various benefits of state and local public employment in one place, at one time. The event took place on both floors of the Convention Center and its entire ballroom meeting space was utilized for planning workshops and education. The collective efforts were aimed to help all Oregon public employees, from new hires to retirees, and everyone in between, to learn about their benefits in a fun and educational space.

**Project Objectives and Branding**

The PERS/OSGP Expo '18 themes were developed to spark event interest, attendance - and some fun. OSGP's contracted record keeper, Voya Financial®, helped provide The "Explore Your Financial Future" designs and themes. They were incorporated into event materials that built upon the success of previous years while expressing the value of attending 2018's event. This event 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 savings strategy and retirement goals.



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**WRITTEN JUSTIFICATION w/ SUPPORTING DOCUMENTS**



**Project Execution**

PERS/OSGP Expo '18 was promoted across multiple platforms and communication pieces. The theme was “Explore Your Financial Future.” The main design was a pathway with life milestones, such as having children, going to college and retiring. Separate presentation paths were created to ensure that there was something for everyone no matter where they were at in their career. This helped them navigate the Expo. The idea behind this theme was to promote awareness of saving for your financial future no matter where you are in life. The Expo was designed to help employees at every stage. The Expo raises awareness of 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 micro campaigns and design pieces were developed and distributed for this comprehensive communication and promotional 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 presentations and events
- “Picture Yourself in Retirement” photo booth activity
- Roth vs. Pre-Tax Money Booth Activity

The Agency Kits were sent to over 1,000 Oregon locations and were a 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 employees. The letter then asked

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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 continued a trend of creating awareness. You can view a 1 minute video of the PERS/OSGP Expo'18 here:

[https://voyamarketingzone.dmplocal.com/sites/3650/osgp\\_expo\\_promo.html](https://voyamarketingzone.dmplocal.com/sites/3650/osgp_expo_promo.html)

Promotion of the event in familiar and new ways yielded immediate results:

- Registration for the event opened to employees in July, 2018
- 2,828 Oregon public employees registered for PERS/OSGP Expo '18
- 9,003 educational workshops were registered for, nearly doubling the registration total from 2017
- 62 hour-long sessions were offered throughout the 10 hour Expo day including information on Oregon PERS, Oregon Savings Growth Plan, myOrangeMoney, Medicare, Voya Retirement Advisors, basic investing concepts, health insurance and social security

#### **Event Execution**

The Salem Convention Center event was the highest attended Expo to date. From 10 am until 8 pm, State and local employees and retirees attended workshops, visited booths, engaged with resources, learned about additional benefits, and were educated on the available options to save more and retire better. While the Expo is an education platform, it is also a time to have fun and socialize with peers. In 2017 we had one activity –“Picture Yourself in Retirement.” Because this activity was such a success and so popular with our attendees we brought it back for 2018. We also added a second activity that was designed to explain the benefits and differences between Roth contributions and pre-tax contributions.

#### **“Picture Yourself in Retirement”**

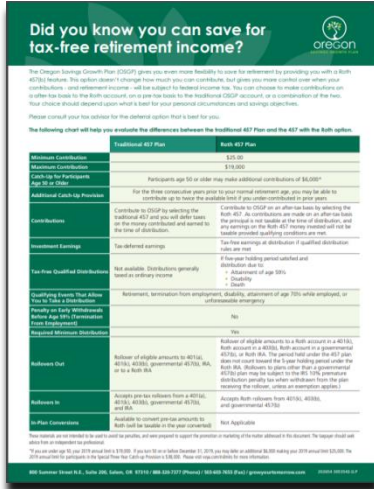
The PERS/OSGP Expo '18 featured an activity that allowed attendees to take a picture in front of a green screen. They would then select a background that reflected their retirement goals. Options ranged from a tropical island to a hiking adventure in the mountains of Oregon. After the background was selected, attendees were given a picture of themselves doing their ideal retirement activity. A copy of their photo was placed on a large poster board with a tree printed on it. The attendees' pictures in retirement created an OSGP branded tree of possibilities in retirement. Everyone has different dreams for their retirement, but the one thing in common is that they have to plan and save appropriately to realize that dream. 500 OSGP branded phone holders were available as giveaways for participating in the activity and 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.

#### **“Roth vs. Pre-Tax”**

The PERS/OSGP Expo '18 featured a second activity that included two money machines filled with “Roth dollars” or “Pre-tax dollars.” The money could be distinguished by the color of the money so it could easily be counted. Traditional, tax-deferred contributions were light green and Roth, after-tax contributions were dark green. Two money machines were set up so participants could compete

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against each other, or compete separately. The machines were set up to run simultaneously, and both had a timer set for 15 seconds. The main idea was to grab as much money as possible in 15 seconds as the machines were blowing money around them. There were so many different ways to capture the money – some people even put on their coats so they could catch more.



Before entering the machine, contestants were asked to declare which money they would be trying to collect – pre-tax or Roth. This allowed the host a chance to educate and explain the difference. Pre-tax and Roth “dollar bills” were shaded different colors of green to identify which was for the contestant. Equal amounts of each bill type were in the machine for collection. If the contestant’s total (pre or Roth) was the highest score at that time, game staff collected his/her name and a way to contact (email or phone) if they were still the top player at the end of the hour. The top player each hour won an OSGP cooler bag. All contestants or attendees who expressed interest or had Roth questions received a Roth flyer with more information.

Everyone won a green OSGP branded piggybank so they could start saving right away, but two lucky winners an hour would grab a winning piece of money. The winners received a personalized 1-hour one-on-one retirement counseling session.



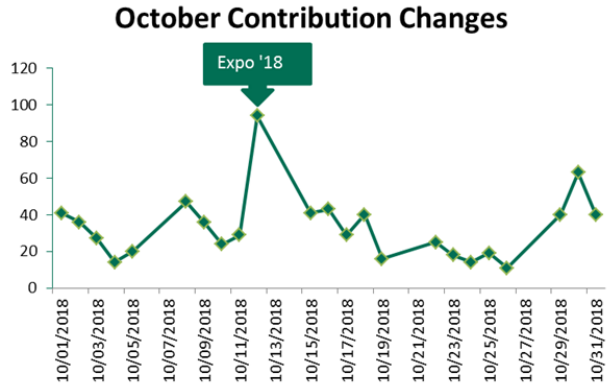
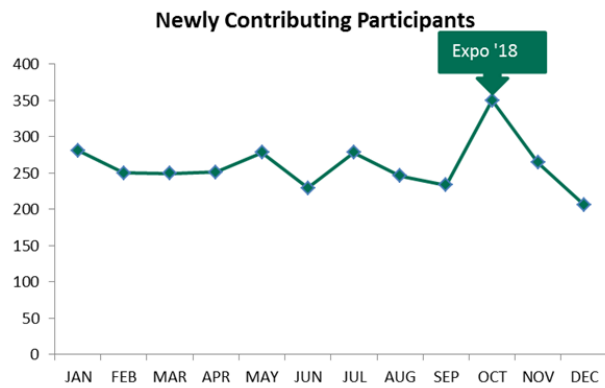
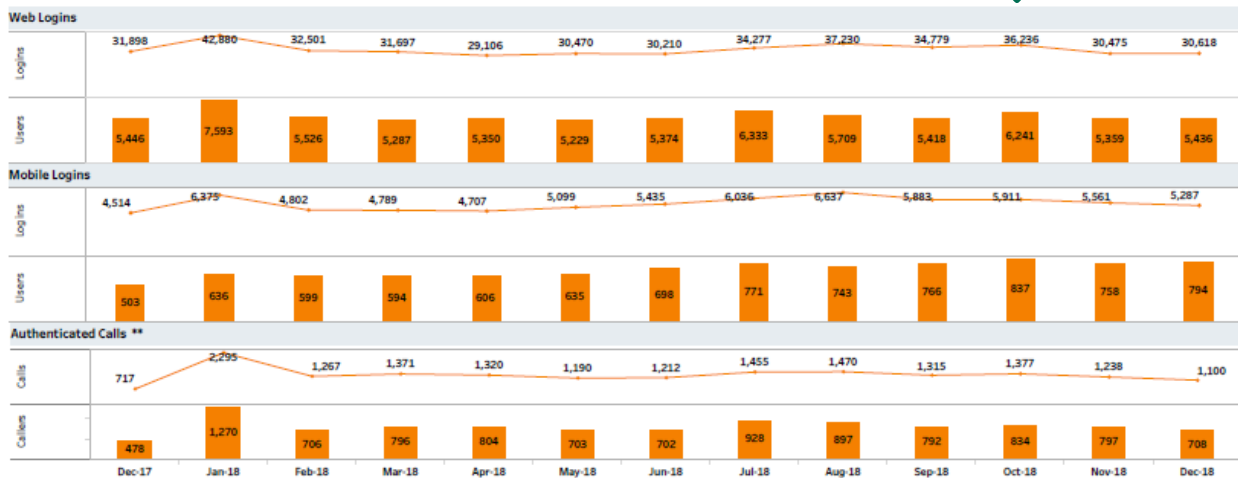
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**Results**

Results from the PERS/OSGP Expo '18 as it relates to the Oregon Savings Growth Plan include:

- 350 newly contributing participants in October; 100 more than the average for every other month
- Contribution changes doubled the daily average on the day of the Expo
- Participant logins through the web and mobile devices increased in October relative to prior months

Expo '18  
↓



Plans for the PERS/OSGP Expo '19 are already underway. This year's goals will include:

- More focus on education
- More financial wellness education
- Continued successful attendance