



2026 NAGDCA Award Submission

Plan profile: City of Phoenix Deferred Compensation Plans

Participants	Assets	Administrator	Consultant
41,940	\$4.05B	Nationwide	Hyas Group

Submission Category: Participant Education and Communication

Initiative: Everyday Plan Champions: *Real City of Phoenix Stories Driving Retirement Readiness*

Background:

The City of Phoenix offers a comprehensive deferred compensation plan in partnership with Nationwide, including:

- 457(b) Plan: Current AUM of \$2.5 billion
- 401(a) Plan: Current AUM of \$1.12 billion
- PEHP Plan: Largest in the country with a current AUM of \$394 million
- Number of Participants: 20,484 457(b) and 21,456 401(a) participants

Across the broader deferred compensation and defined contribution program, The City of Phoenix is **nearly \$3.60 billion** in assets and **more than 41,080 participants** when the current contract was renewed (401(a), 457(b) and PEHP combined) in 2025.

Background Information: The City of Phoenix offers a strong retirement program with high eligibility and participation. However, plan leaders identified a persistent gap: many employees enrolled in the 457(b) plan but **did not fully understand how ongoing contributions translate into long-term financial security or the lifestyle they want in retirement**. Internal discussions and participant feedback highlighted:

- **Low comprehension of retirement readiness concepts** despite years of communication and education.
- A desire for **more relatable, people centered stories** rather than purely technical or product-focused messaging.
- The opportunity to connect the plan more directly to **employees' real passions, families and communities**, especially in a large, diverse workforce.

To address this, the City and Nationwide co-created the **Plan Champion Campaign** – a story telling driven initiative designed to humanize the Deferred Compensation Plan and bring retirement readiness to life through the voices of real City of Phoenix employees.

Goals:

The Plan Champion Campaign was designed to:

1. **Deepen awareness and understanding** of the City of Phoenix Deferred Compensation Plan by shifting from abstract concepts to **real, relatable employee stories**.
2. **Showcase five “Plan Champions”** – actual City employees whose consistent saving and use of plan tools are enabling them to pursue personal passions – across video, photography, and in-person events.
3. Build a **multi-channel content library** (videos, lifestyle photography, landing page, monitor slides, posters, emails) that could power ongoing financial wellness communications before, during and after the City’s Financial Expo.
4. **Expand the pipeline of new Champions**, with a particular focus on **first responders and public safety employees** in 2026 with targeted outreach to encourage employees to share their own stories.

Detailed Description of the Project:

The **Plan Champion Campaign** is a multi-year, multi-channel initiative that centers five real City of Phoenix employees as “Champions” of retirement readiness. Their stories are captured through **professionally produced video testimonials and lifestyle photography shot in iconic Phoenix locations**, then deployed across the City’s digital, onsite and in-person financial wellness ecosystem. Each Champion story shows:

- How they **use the Deferred Compensation Plan and its tools** (e.g., My Income & Retirement Planner) to build retirement confidence;
- The **life they are working toward** – from pickleball in local parks to time with family – demonstrating tangible, personal outcomes of steady saving;
- How they serve as **peer influencers**, encouraging coworkers to enroll, increase contributions, and seek education and advice.

Pre-production and filming (Spring 2025)

- Nationwide conducted a **tech scout on May 13, 2025**, followed by **two full production days on May 14–15, 2025**.
- Shot on location with **five active City employees** – Inger Erickson, Michael Bauer, Terry Ann Lawler, Sarah Martin and Joseph Hunter – across **Solano Park, Papago Park, Burton Barr Central Library, Desert Botanical Garden and a private residence** to authentically reflect Phoenix’s people and places.
- Captured **lifestyle photography** and **video testimonials** using a professional-still photographer and videographer, with careful attention to **diversity of age, gender, job function and tenure** to mirror the City’s workforce.

Campaign Phase 1 – Champion videos & Financial Expo integration (Fall 2025 – Winter 2026)

- Produced **five full-length Plan Champion videos plus a compilation video** highlighting all Champions as the centerpiece of the City’s financial wellness narrative.
- Used Champions to anchor the **Onsite Financial Expo on October 22**, where all five Champions were featured in person to share their journeys and interact with attendees.
- Deployed a **series of teaser and follow-up emails** driving employees to a dedicated **Plan Champion landing page** that housed all videos.
- Supported the campaign with onsite **monitor slides** and **workplace posters** (including QR codes linking directly to Champion videos) displayed across City buildings to keep the stories visible beyond the Expo.
- Launched the **“Meet your Phoenix Plan Champions”** section prominently on phoenixdcp.com, further integrating the stories into the everyday digital experience for participants.

Campaign Phase 2 – Topical videos & ongoing engagement (2026)

Building on Phase 1, the City and Nationwide extended the campaign to support **ongoing, action-oriented engagement**:

- Re-edited Champion footage into **short, topical videos** focused on four key questions:
 - **“Are you saving enough?”** (CTA: use My Income & Retirement Planner or increase contributions)
 - **“Want service and support?”** (CTA: meet your Nationwide Retirement Specialist)
 - **“Not contributing yet?”** (CTA: enroll in the plan)
 - **“Want to boost your financial education?”** (CTA: attend a webinar)
- Built a **12-month content calendar** that alternated between:
 - **Champion focused emails** highlighting individual stories; and
 - **Topical video emails** with direct calls-to-action to contribute, enroll, schedule an appointment or attend education sessions.
- Continued to refresh **monitor slides** and **workplace posters**

To sustain and expand the program, Phase 2 of the campaign introduced tactics to **recruit the next generation of Champions**, with a First Responder focus. A targeted email to public safety and first responders was created,

asking for nominations and volunteers to become future Plan Champions, ensuring the campaign reflects those on the front lines of the community.

Significance of the improvement to the operation of the plan

The Plan Champion Campaign has meaningfully **improved how the City of Phoenix operates and promotes its deferred compensation program**, in several ways:

1. **Human-centered education model**
 - Shifted communications from generic plan descriptions to **real employee narratives**, helping participants connect emotionally with retirement savings and see themselves in success stories.
2. **Integrated, multi-channel engagement strategy**
 - Created a cohesive experience spanning **web, email, onsite signage, posters, digital monitors, webinars, and in-person meetings**, all anchored around consistent Champion stories and visuals.
3. **Re-usable asset library**
 - Invested in high-quality video and photography that can be **repurposed across multiple years and campaigns** (Champion stories, topical videos, landing pages, internal newsletters, expo promotions), maximizing ROI on creative spend.
4. **Operational alignment between sponsor, consultant and recordkeeper**
 - The campaign required **tight partnership among the City's Deferred Compensation Board and staff, Hyas Group, and Nationwide**, aligning communications, field work, and digital experiences around a shared financial wellness vision.

Examples and supporting materials

The following components are available as supporting materials and are referenced throughout this narrative:

- Five **individual Plan Champion videos** and one **compilation video**.
- A **Plan Champion landing page** on phoenixdcp.com, plus homepage tiles and banners featuring Champion imagery and links to the video page.
- **Lifestyle photography** of Champions in Phoenix locations, used for web, Expo signage, and collateral.
- **Elevator and lobby monitor slides** and **workplace posters** with QR codes linking to specific Champion or topical videos.
- **Targeted emails** promoting Plan Champion stories, and topical videos with enrollment and contribution CTAs.
- Materials for the **Everyday Plan Champions Expo**, including signage, handouts and Champion themed giveaways.

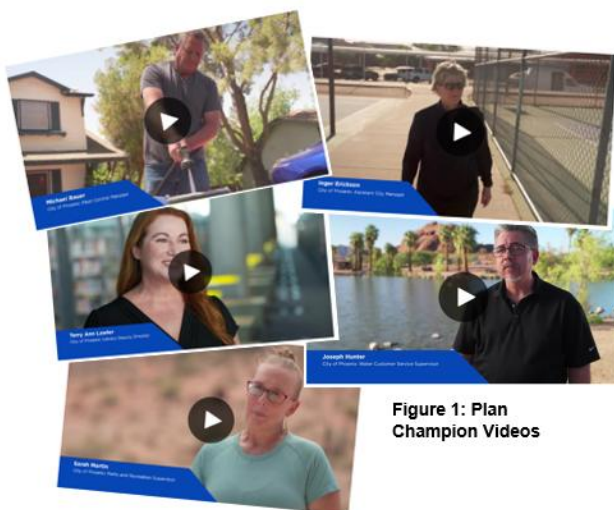


Figure 1: Plan Champion Videos

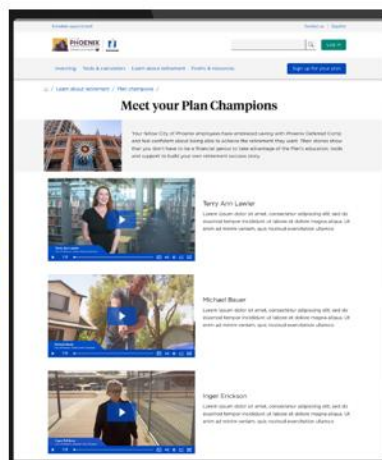


Figure 2: Plan Champions landing page housing all five Champion stories and acting as the hub for email, QR, and signage traffic.



Figure 3: Large format digital signage, targeted email and Financial Expo material featuring our Plan Champions

Results:

The Plan Champion Campaign sits within a broader, data driven financial wellness strategy at the City of Phoenix. While no single initiative can claim full credit, several **key outcomes and indicators** demonstrate the impact of this story-telling based approach. With the launch of the campaign, we have seen more engagement across the plan spanning long after just the in-market launch.

Plan growth and engagement

- The City's 457(b) Plan **net fiduciary position increased from \$2.00 billion to \$2.5 billion** between 2024 and 2025, supported by both market performance and robust employee contributions.
- **Employee contributions** to the 457(b) Plan rose from **\$156.3 million in 2024 to \$172.7 million in 2025**, reflecting continued engagement and savings behavior among active participants.
- The number of **active 457(b) participants increased from 10,482 to 11,606** over the same period, signaling steady growth in employees actively building retirement savings.
- **Participants with a MIRP score:** 69%, a **6-percentage-point increase** from Q3 2024.
- **MIRP "on track" scores:** Chance-of-success "on track" increased from 63% to 80%, indicating more participants aligning savings with retirement goals.
- **Beneficiary behavior:** 18,636 beneficiary accounts, with **607 new beneficiaries added since 2024**, addressing a longstanding concern about participants without a beneficiary on file.

These plan-level results occur in the same window that the Plan Champion Campaign and related financial wellness initiatives were launched and expanded, suggesting that **relatable storytelling and multi-channel outreach are effectively supporting participation and savings behaviors**.

Education and advice utilization: The City and Nationwide have seen **strong engagement with education and one-on-one support**, a key objective of the campaign:

- Recent program reporting highlights **150 group meetings with 4,666 attendees** and **4,808 one-on-one consultations** delivered by Retirement Specialists, demonstrating employees' willingness to seek guidance and take-action.
- Champions are prominently featured in education materials, expo sessions, and digital content, serving as **trusted peer advocates** who drive interest in workshops, webinars, and appointments with Retirement Specialists.

Digital engagement and experience: The Plan Champion Campaign was coordinated with a **Phoenix branded web redesign** and enhanced pre-login experience on phoenixdcp.com, which together improved digital engagement:

- The redesigned site delivered **improved user experience and mobile optimization** and **"exceeded all goals across engagement, pageviews and bounce rate,"** with Plan Champion visuals and tiles helping to draw traffic into savings tools and educational content.
- A prominent **"Meet your Phoenix Plan Champions"** tile on the homepage drives visitors to the Champion video page, where employees can watch peers explain how they use the plan and its tools.

Cultural and behavioral impact - Beyond quantitative KPIs, the Plan Champion Campaign has helped:

- **Normalize conversations about retirement** across departments, as employees see colleagues on screens, posters and web pages discussing their savings decisions.
- Create a **recognition and pride component** for Champions, who are celebrated at events like the Everyday Plan Champions Expo and in internal communications.
- Encourage **ongoing story collection**, and targeted outreach to first responders building a sustainable pipeline of future Champions.

Plan Champion video performance and attention metrics: In addition to plan level and education metrics, Nationwide tracks detailed **video analytics** for the six Plan Champion videos to measure how deeply employees are engaging with the stories. Over the period **June 1, 2025 – April 1, 2026**, the six Champion videos collectively delivered:

- **6,120 video loads**, resulting in **1,261 total views** and **967 unique viewers**, indicating broad reach across the workforce.
- A **global attention span of 80%** and more than **34 hours of total watch time** (1 day, 10 hours, 7 minutes, 23 seconds) for just under 13 minutes of total video content, showing that viewers are watching most of each story rather than dropping off early.

At the individual video level, performance is both strong and consistent:

- **“Meet Michael, City of Phoenix Plan Champion”** – **432 total views**, average watch time **1:36** and **79% attention span**.
- **“Meet Inger, City of Phoenix Plan Champion”** – **333 views**, **1:43** average watch time and **80% attention span**.
- **“Meet Terry Ann, City of Phoenix Plan Champion”** – **257 views**, **1:45** average watch time and **79% attention span**.
- **“Meet Sarah, City of Phoenix Plan Champion”** – **205 views**, **1:46** average watch time and **81% attention span**.
- **“Meet Joseph, City of Phoenix Plan Champion”** – fewer but highly engaged viewers (**15 views** with **91% attention span** and **3:03** average watch time).
- The **compilation video** introducing all five Champions has **19 views** and a **73% attention span**, serving as an effective overview asset for events and digital placements.

The campaign is also clearly integrated into the plan’s digital ecosystem and communications:

- **636 video views** originated directly from www.phoenixdcp.com, with additional views coming from **share.vidyard.com** links embedded in emails and from the staging site — demonstrating that employees are discovering Champion content both through the plan website and through targeted campaigns.
- **57% of views occur on mobile devices** and **43% on desktop**, confirming that the short, story driven formats perform well on phones and tablets where many employees consume content.
- Views are concentrated in the **United States (100%)**, aligning with the City of Phoenix’s workforce footprint.

Taken together, the **plan level growth in assets and participation, strong education utilization, improved digital engagement, and robust video metrics** show that the Plan Champion Campaign is not only resonating with employees but also driving measurable, sustained engagement with the City’s Deferred Compensation Plan.

Feasibility of Use by Other Governments:

The City of Phoenix Plan Champion Campaign is built to be easy for other public-sector plans to copy and scale. Similar-sized governments can work with HR, retirement committees and field staff to nominate employees who model strong retirement behaviors, making sure Champions reflect different departments, roles and demographics. Simple tools such as smartphone recordings can capture initial stories, with the option to professionally reshoot a few if budget allows. Content can range from basic interview-style videos filmed at worksites to higher-production lifestyle footage in recognizable local spots. Existing benefits fairs, expos and retirement seminars can easily feature Champions as speakers, faces on signage and giveaways, and anchors for related campaigns—no new events required. The model also flexes for different budgets: larger plans can invest in professional production and build a multi-year asset library, while mid-sized and smaller plans can start with smartphone videos and short interviews, highlighting just one or two Champions a year and expanding over time. In all cases, the core insight holds: **participants are more likely to engage with retirement planning when they see relatable, authentic peers modeling the behaviors and outcomes they aspire to**. By translating that insight into a structured, reusable campaign, the City of Phoenix Plan Champion initiative offers a **practical, proven roadmap** for other public-sector sponsors seeking to move beyond traditional plan communications and toward **human-centered, story driven financial wellness**.

Commentary: *“The Plan Champion Campaign has transformed how our employees see the Deferred Compensation Plan. When they watch a colleague talk about using the plan to fund a passion, support a family or retire with confidence, retirement planning stops feeling abstract and starts feeling achievable for them, too.”*

— Scott Steventon, Retirement Program Director, City of Phoenix Deferred Compensation Plan