



Inter Office Memo

DEPARTMENT OF
HUMAN RESOURCES

ITEM 7

DATE: May 23, 2019

TO: Deferred Compensation Management Council

FROM: Hollis Magill, Human Resources Manager *Hollis Magill*

SUBJECT: Deferred Compensation Plan Outreach Report

Background

Your Council has made it a priority to reach out to active participants, non-participating employees and retired participants. The purpose of this item is to report on the state of Plan participation, outreach efforts in the previous quarter, and to present staff and Nationwide's planned efforts. As of April 30, 2019, the participation rate is 54.3%, based on 3,882 contributions and 7,151 eligible employees. In addition, as of May 10, 2019, there are 6,453 total Plan participants, which includes both active and retired/separated employees.

Issue

Staff has prepared a summary of activity for both staff and Nationwide, as well as planned activity of staff and Nationwide. In addition, Attachment A provides detailed Plan participation statistics by age band, department, retirement tier, and employee group.

Prior Activity

Save Today!

- Nationwide and County staff organized the Fourth Annual Save Today! campaign, which encourages employees to save more for retirement by enrolling in the Plan or increasing their contributions.
- In total, there were 334 participants, with 64 new enrollments and 156 participants choosing to increase their contributions.
- Five (5) Nationwide Retirement Specialists visited 29 work sites in 2019, logging approximately 124 hours on site. In addition, Nationwide mailed a communication to all County employees with campaign dates as well as contribution increase and enrollment forms to all eligible employees two weeks before Save Today.
- County staff sent daily emails to support Save Today, which included the daily schedule, as well as links to forms and other information to encourage participation.

County Staff

- Staff assisted 39 retirees to set up contributions of their annual leave payouts to their Plan accounts totaling approximately \$475,000.

- Staff sent emails encouraging saving their pending cost of living adjustments to all employees in the Deputy County Counsel, Correctional Sergeant and Correctional Officer classification series, as well as to all employees in Bargaining Units 25 and 31. In total, emails were sent to 663 employees.

Nationwide/Phillip Edwards

- 56 County work locations visited, 6 New Employee Orientation sessions attended – resulting in 125 enrollments out of possible 218 (57% “Close Rate”) – and approximately 1000 emails and/or phone calls to individuals
- Total Activity: 313 individual interactions; 7 group presentations; 149 enrollments, and 58 contribution increases.

Planned Activity

County Staff

- Staff will send emails to Bargaining Units 1, 14, 35, 38 as well as 3, 4, 12, 22, 36 regarding their cost of living adjustments and encouraging them to enroll or increase their contributions.
- Staff will begin sending emails to all employees who haven’t changed their contribution for 12 or more months.
- Staff and Nationwide, contingent upon approval of funding contained in Item #6 on today’s agenda, will begin planning retiree outreach luncheons.
- Staff and Nationwide will utilize the participation data in Attachment A to develop targeted marketing campaigns to employees in groups with below average participation rates and/or contribution amounts.

Nationwide/Phillip Edwards

- 53 confirmed site visits as of 4/22/19. This includes scheduled visits to multiple new buildings for the Department of Behavioral Health due to the assistance of Member Seymour and County staff.
- There are 6 NEO’s scheduled for Q2 2019.
- Nationwide is working on a custom mailer to be sent to participants who retire or separate from service, and will contain general information about the advantages of staying in the Plan.

Recommended Actions

There are no recommended actions associated with this item.

Item 7 – Attachment A

Plan Participation by Retirement Tier (as of 4/30/2019)

Tier	Total Employees	Enrollment	Participation %	Avg. Contribution
Gen Tier I	2408	1284	53.3%	\$138.55
Gen Tier II	97	64	66.0%	\$154.52
Gen Tier III	593	278	46.9%	\$92.29
Gen Tier IV	259	134	51.7%	\$103.86
Gen Tier V	2793	1457	52.2%	\$65.44
Safety Tier I	443	293	66.1%	\$185.65
Safety Tier II	55	35	63.6%	\$263.39
Safety Tier IV	65	42	64.6%	\$196.38
Safety Tier V	438	295	67.4%	\$132.22
Totals:	7151	3882	54.3%	\$111.69

Plan Participation by Department (as of 4/30/2019)

Department	Total Employees	Enrollment	Participation %	Avg. Contribution
Administrative Office	30	15	50.0%	\$118.90
Agriculture Department	89	59	66.3%	\$99.80
Assessor-Recorder	119	60	50.4%	\$182.42
A-C/T-TC	91	46	50.5%	\$109.73
Behavioral Health	490	231	47.1%	\$106.62
Child Support Services	208	103	49.5%	\$86.54
County Clerk - Elections	25	16	64.0%	\$101.34
County Counsel	30	17	56.7%	\$196.31
District Attorney	228	113	49.6%	\$248.12
Human Resources	61	48	78.7%	\$136.18
Internal Services	380	187	49.2%	\$91.17
Library	303	108	35.6%	\$60.39
Probation	601	375	62.4%	\$94.03
Public Defender	126	60	47.6%	\$152.80
Public Health	358	214	59.8%	\$168.10
Public Works	373	187	50.1%	\$122.31
Retirement Association	31	26	83.9%	\$122.86
Sheriff - Coroner	1151	744	64.6%	\$160.82
Social Services	2457	1273	51.8%	\$68.46
Totals:	7151	3882	54.3%	\$111.69

Item 7 – Attachment A

Plan Participation by Age Band (as of 4/30/2019)

Age Band	Total Employees	Enrollment	Participation %	Avg. Contribution
18-29	1059	576	54.4%	\$68.58
30-39	2048	1137	55.5%	\$86.61
40-49	2004	1115	55.6%	\$114.79
50-59	1508	821	54.4%	\$154.54
60+	532	233	43.8%	\$174.86
Totals:	7151	3882	54.3%	\$111.69

Plan Participation by Employee Group (as of 4/30/2019)

Employee Group	Total Employees	Enrollment	Participation %	Avg. Contribution
Management	545	350	64.2%	\$210.20
Unrepresented	341	192	56.3%	\$98.69
Unit 01	418	284	67.9%	\$193.38
Unit 02	1056	612	58.0%	\$100.21
Unit 03	545	263	48.3%	\$84.71
Unit 04	1076	590	54.8%	\$54.20
Unit 07	62	37	59.7%	\$247.16
Unit 10	43	28	65.1%	\$228.68
Unit 11	181	133	73.5%	\$88.86
Unit 12	1342	556	41.4%	\$45.22
Unit 13	126	68	54.0%	\$62.30
Unit 14	44	28	63.6%	\$216.25
Unit 19	159	99	62.3%	\$158.99
Unit 22	245	99	40.4%	\$71.10
Unit 25	51	20	39.2%	\$123.71
Unit 30	102	56	54.9%	\$303.29
Unit 31	63	34	54.0%	\$154.84
Unit 35	27	20	74.1%	\$238.49
Unit 36	439	245	55.8%	\$132.02
Unit 37	38	32	84.2%	\$174.38
Unit 38	5	5	100.0%	\$238.00
Unit 39	66	32	48.5%	\$67.23
Unit 40	22	17	77.3%	\$127.22
Unit 42	24	10	41.7%	\$178.94
Unit 43	131	72	55.0%	\$142.52
Totals:	7151	3882	54.3%	\$111.69