



**North Carolina**  
Total Retirement Plans



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

# Online Retirement Communications Plan

## Goals & Objectives

1. **Spread the Word.** Inform members and employers about the new online retirement application.
2. **Engagement.** Increase percentage of users who apply online versus paper application.

## Timeframe

The online retirement application will launch on Tuesday, November 13, 2018. The communications plan spans the weeks leading up to that launch date and beyond.

## Target Audiences

- Current state and local government employees (members of TSERS and LGERS only)
- State and local government employers (participating in TSERS and LGERS only)
- General Assembly/General Public/Media
- Third-Party Associations

## Collateral Materials

Below are a list of materials to be developed and dispersed during this project:

- Press release about upcoming launch
- Internal talking points for Call Center staff/counselors
- One-page flyer about online application
- Process Map
- Online retirement slide for inclusion in other presentations
- FAQs on RSD website for members
- FAQs on RSD website for employers

## Available Communications Tools

For this project, we can leverage the communications tools controlled by RSD, and we can also leverage the tools owned and maintained by the OST communications staff. These tools include:

- Press releases
- DST, RSD, SHP and SRP websites
- Social media for RSD, DST and SHP
- Third-party association newsletter/email channels, if willing to participate
- Videos
- RSD *Monitor* emails
- Member emails
- SRP Signature and Employer newsletters
- In-Person Association Roundtable demonstration
- Internal newsletter, *The Navigator*
- SHP pre-65 meetings
- RSD Retirement Conferences

## Calendar

WEEK	AUDIENCE	CHANNEL	NOTES
<b>OCT. 8-12, 2018</b>	Current state and local government employees	<ul style="list-style-type: none"> <li>• RSD Facebook post</li> <li>• DST Facebook post</li> <li>• DST Twitter post</li> <li>• “Coming Soon” web post to RSD and DST pages</li> <li>• <i>Navigator</i> article for DST employees</li> </ul>	<p>SHP/ERG staff to share one-pager about online retirement with pre-65 and nearing retirement conference attendees/ incorporate in presentations</p> <p>See if it can be incorporated as BEACON message.</p>
<b>OCT. 15-19, 2018</b>	Current state and local government employees	<ul style="list-style-type: none"> <li>• RSD Facebook post</li> <li>• DST Facebook post</li> <li>• DST Twitter post</li> <li>• <i>Navigator</i> article for DST employees</li> </ul>	Ask DST HR/OSHR to email HR Directors
	State and local government employers	<ul style="list-style-type: none"> <li>• <i>Monitor</i> article/Email message #1</li> </ul>	Highlight launch date and remind employers to respond to survey to provide 6C contact info; incorporate highlights of new application and benefits to members
	Third-Party Associations	<ul style="list-style-type: none"> <li>• Association Roundtable Meeting demonstration</li> <li>• Newsletter entries</li> </ul>	Ask Associations to consider article in their newsletters/ emails to membership; provide general article text during meeting
<b>OCT. 22-26, 2018</b>	Current state and local government employees	<ul style="list-style-type: none"> <li>• RSD Facebook post</li> <li>• DST Facebook post</li> <li>• DST Twitter post</li> </ul>	SHP to share all RSD/DST posts
	State and local government employers	<ul style="list-style-type: none"> <li>• Email message #2</li> </ul>	
	Third-Party Associations	<ul style="list-style-type: none"> <li>• Email message</li> </ul>	Remind about upcoming launch and share links to FAQ docs and other resources
<b>OCT. 29 - NOV. 2, 2018</b>	Current state and local government employees	<ul style="list-style-type: none"> <li>• RSD Facebook post</li> <li>• DST Facebook post</li> <li>• DST Twitter post</li> </ul>	
	Third-Party Associations	<ul style="list-style-type: none"> <li>• Newsletter entries</li> </ul>	

WEEK	AUDIENCE	CHANNEL	NOTES
NOV. 5-9, 2018	Current state and local government employees	<ul style="list-style-type: none"> <li>• RSD Facebook post</li> <li>• DST Facebook post</li> <li>• DST Twitter post</li> <li>• “Coming Soon” email message to actives</li> <li>• Web update</li> </ul>	Need to try to target “coming soon” message to targeted group of actives (see MRS data set with normal retirement age data)
	State and local government employers	<ul style="list-style-type: none"> <li>• Email message #3</li> </ul>	Launch reminder and final push for survey responses
	General Public/Media	<ul style="list-style-type: none"> <li>• Press Release</li> <li>• Include in “Ask Me Anything” call with media</li> </ul>	
	Third-Party Associations	<ul style="list-style-type: none"> <li>• Newsletter entries</li> <li>• Reminder email of launch date and resources</li> </ul>	
ON-GOING	Current state and local government employees	<ul style="list-style-type: none"> <li>• RSD Facebook post</li> <li>• DST Facebook post</li> <li>• DST Twitter post</li> <li>• Web updates</li> </ul>	<p>Share survey results, continued enhancements and resources as they become available.</p> <p>Consider automatic targeted message to Nearing Retirement Conference attendees and on-site retirement counseling sessions to highlight features of online application.</p>
	State and local government employers	<ul style="list-style-type: none"> <li>• Email message</li> <li>• <i>Monitor</i> article</li> </ul>	Share survey results, continued enhancements and resources as they become available.
	General Assembly/General public/Media	<ul style="list-style-type: none"> <li>• Press release</li> <li>• Media interviews</li> </ul>	Share findings and enhancements
	Third-Party Associations	<ul style="list-style-type: none"> <li>• Newsletter entries</li> </ul>	