



North Carolina
Total Retirement Plans



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Communications 2021



North Carolina
Total Retirement Plans
401k | 457 | 403b



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2020 in Review – What We Set Out To Do

ENGAGE

Transform Delivery through refreshed creative and digital content



Website & Digital Communications
have high levels of engagement

69% of Participants have Email Address On File

EDUCATE

Employer Education Program
Introduce new tools and resources to participants

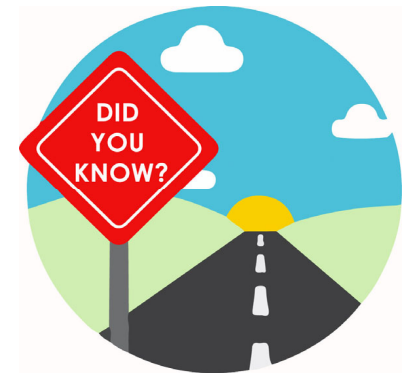


**Launch of Employer
Education Webpage**

<https://ncplans.retirepru.com/employer.html>

EMPOWER

Activate outcomes in
participation and asset retention



**New Digital Enrollment
Nearing Retirement
Employer Newsletter**



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2020 in Review – Where we are Now



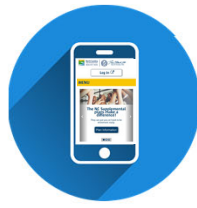
233,437

TOTAL UNIQUE
VISITORS



22,397

Average Monthly
Desktop Visitors*



7,626

Average Monthly
Mobile Visitors*



7.40

Average Session
(minutes & seconds)

Average Session went up
over 5 minutes per user



- Exceeding Stretch Goals



- Invested in Technology Enhancements

*Unique visitors: unduplicated visitors during
each month as identified by IP Address.



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**Good news! You don't
have to lift a finger!**

2020 in Review – Where we are Now

With retirement on the horizon, before you think about taking money out of your 401(k) or 457 Plan(s), check out the [Cost Comparison Document](#). This tool compares costs to help you make an informed decision, because the NC Plans are competitively priced.

Instead of withdrawing your assets from the plan(s), here are some *other* options you may want to consider:

1. Keep your money in the plan(s) when you retire.

You don't have to do a thing! The money you've worked so hard to save can stay in your account, until you need it. That will allow you to continue taking advantage of all the plans' great features and benefits—such as:

- competitive costs
- a wide range of investment options, including GoalMaker®, which can take you into and through retirement
- strong, trusted oversight from the NC Supplemental Retirement Board of Trustees (which includes ongoing monitoring of investment performance and fees)
- access to the plans' local Retirement Education Counselors at *no* extra charge

2. Make a one-time contribution to the plan(s).

- **Nearing Retirement Engagement Success**
97% Open Rate – consistent over the last 4 years
40% Click Through to Cost Comparison Documents



Leveraging Technology for
Enrollments, Retirement Readiness and Nearing
Retirement

Virtual Group & One-on-One
Webinars
Animations
Employer Education Project Webpage



2020 in Review - Where we are Now



Congratulations

**Treasurer Folwell,
the Supplemental Retirement
Board of Trustees & staff**
are recognized with the Leadership
Award for Plan Design & Administration
for *the Importance of Employer
Contributions*.

https://www.nagdca.org/wp-content/uploads/vfb/2020/05/NAGDCA-NC-Employer-Contributions-Plan-Design-Administration-FINAL-5.1.20-RS_BR_RE486_01.pdf

- **National Retirement Security Week turned Month**

Dedicated Webpage, Social Media Campaign, Retirement Webinars

Launch of *Roadmap to Retirement* – **1600 registrants** over two events in one day

Increase in actions, overall reach and post engagements on social media

Launch of the NEW Digital Enrollment Experience
(coinciding with Open Enrollment & National Retirement Security Week)

Rolled Out the 24 | 7 | 365 communication campaign

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Log in

Home | Plan Info/Enroll | Increase Savings | Choose Investments | Nearing Retirement | Tools & Resources | Information for Employers

Plan Information and Enrollment

SAVING IN THE SUPPLEMENTAL PLANS MAKES A BIG DIFFERENCE

77% of those **enrolled in the plan** are on track to be retirement ready¹

VS.

44% of those **NOT enrolled** are on track to be retirement ready¹

WHY THESE PLANS?

TOP 4 REASONS
these plans are outstanding choices for members

GET READY TO ENROLL

Find out what plan(s) you may be eligible for:

I DON'T work for a state agency | I work for a state agency

- Select your employer type and name
Employer type **1**
Select your employer type **v**
Employer name

[I want to learn more about key plan features](#)
- Select your enrollment form(s) for download
- Download enrollment form(s)

2020 in Review – Where we are Now

- NEW Digital Enrollment Experience**

Launched on September 11, 2020

Open Enrollment Campaign October 15 – 31, 2020

<https://ncplans.retirepru.com/enrollment.html>

	Pre OE 4.5 weeks 9/11-10/14	OE 2 weeks 10/15-31
Page Views	3,274	14,724
Unique Visitors	2,270	11,425
Forms Downloaded	860 (26% of page views)	3,376 (23% of page views)
Animation Views	212	1,004

Animations

	Pre OE 4.5 weeks 9/11-10/14	OE 2 weeks 10/15-31
1. Getting Started	51 views/ 24%	1. MRS 342 views/ 34%
2. How Much Should I Save	50 views/ 23%	2. How Much Should I Save 255 view/ 25%
3. MRS	45 views/ 21%	3. Getting Started 183 views/ 18%
4. Selecting Investments	38 views/ 18%	4. Selecting Investments 160 views/ 16%
5. Five Key Reasons to Save	28 views/ 13%	5. Five Key Reasons to Save 64 views/ 6%

Five Key Reasons to Start Saving Today
Reasons to avoid procrastinating and to enroll today.
00:01:45

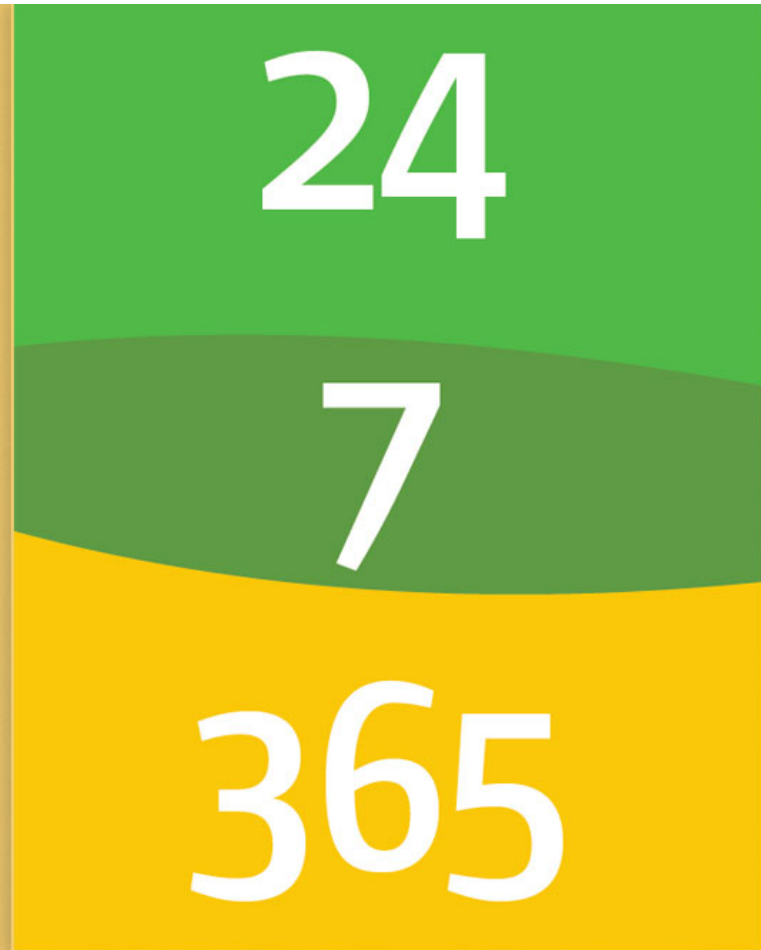
myNCRetirement Statement (MRS)
Take a guided tour of the MRS.
00:02:04

Selecting Investments
Overview of how to select investments.
00:02:07

Getting Started
Three simple steps to enroll.
00:02:53

How Much Should I Save?
Exploring different examples and considerations.
00:01:56

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**A better financial future is ready
whenever, wherever you are.**



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2021 - Goals



Increase Plan adoptions and employee participation



Increase savings contributions



Increase asset retention



Increase effectiveness of communications' and availability 24 | 7 | 365

On the Move to 2021 - Goals

ENGAGE

Continue to transform Delivery through refreshed creative and digital content



**Refresh Messaging
& Channels**



**Virtual
One-On-One**



EDUCATE

Employer Education Program
Introduce new tools and resources to participants



**Employer Education
& Engagement**



**Start Earlier with Nearing
Retirement Messaging**



EMPOWER

Activate outcomes in
participation and asset retention



**Online Enrollment for
All Future Participants**



**Encourage Ongoing Asset
Growth & Retention**



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Questions



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Thank you



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Appendix – Social Media

You don't have to roll out.



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You can stay AND roll in!

Enroll Online!

SAVING IN THE SUPPLEMENTAL PLANS MAKES A BIG DIFFERENCE

77%

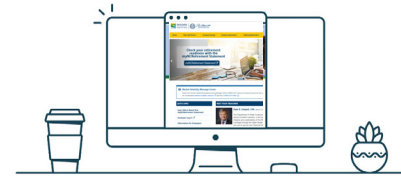
of those enrolled in the plan are on track to be retirement ready!

VS.

44%

of those NOT enrolled are on track to be retirement ready!

New ONLINE Digital Enrollment Experience
for the
NC 401(k), NC 457 Plans, & NC 403(b) Program



Take Time to FOCUS on the Future.

It's YOUR Retirement!



myNCRetirement.com and ORBIT



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encouraging you
to save MORE today
for your TOMORROW

myNCRetirement.com

Happy National
Day of Encouragement



Give your retirement
some love this month.

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Your February 2020 Checklist:

- ✓ Show some love to your future self.
Think about your retirement - where you are now and where you want to be. Assess your retirement goals and make a plan.
- ✓ Maximize your savings for retirement.
Things you do today will impact your tomorrow. Gain momentum in your retirement goals by saving today.
- ✓ Plan, learn and understand YOUR retirement.
Participate in webinars and conferences held throughout the year. Use the retirement tools available to you through ORBIT, myNCRetirement.com and NCRPlans.pridentid.com. Be ready for retirement...wherever you are.

FEED YOUR
NEEDS
IN RETIREMENT

Retirement...
isn't just about the money.

Arts, Crafts & Creativity	Attending Shows	Automobiles	Collecting
Computers & Tech	Cooking & Baking	Family Activities	Going to Movies
Healthy Eating	Home Improvement	Learning & Education	Local Trips
Outdoor Pursuits	Reading	Relaxing	Shopping
Sports & Exercise	Starting a Business	Visiting Museums	Volunteering
Watching TV	Working Part Time	World Travel	

What matters most to you and how will
you spend your time in the future?



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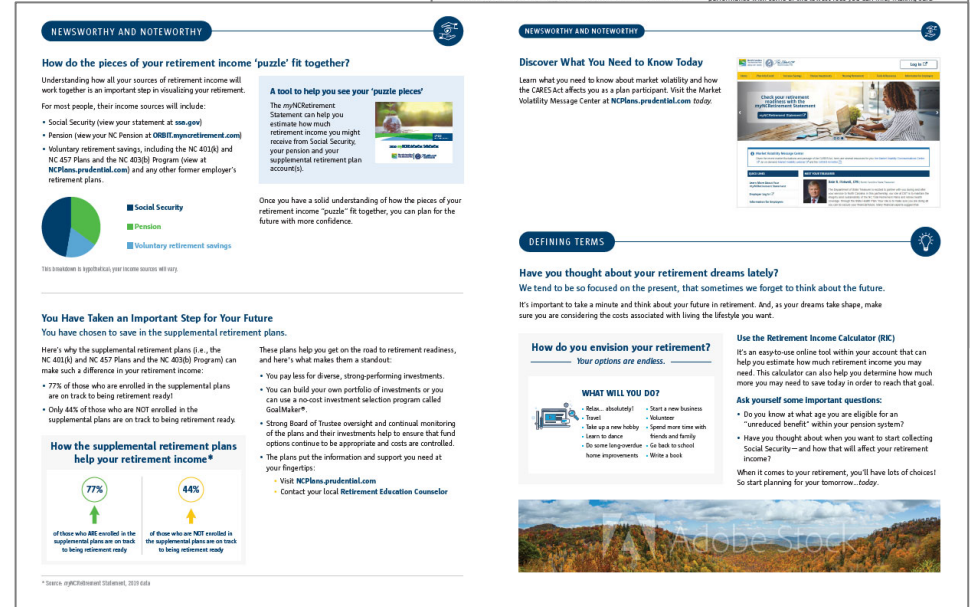
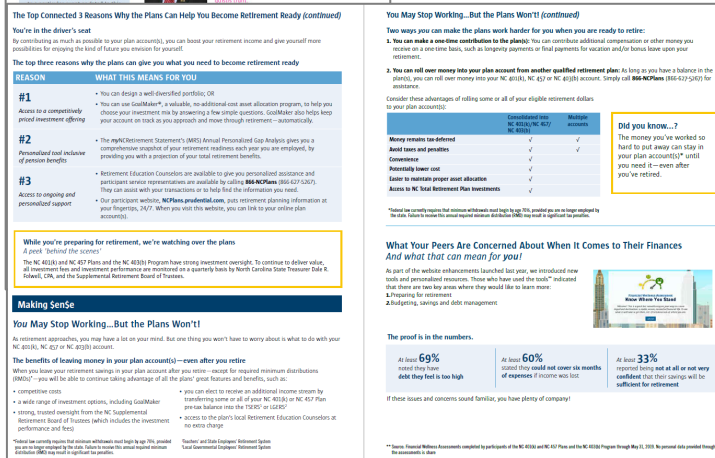
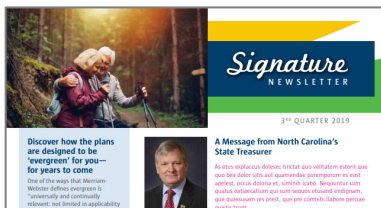


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Appendix – Before & After

Refreshing the Signature Newsletter Layout and Content

- Simplified and refreshed layout
- Messaging is presented in a way that speaks to the large variety of participants
- Topics are current and relevant



before



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after