

Deferred Compensation Plan BOARD REPORT 11-52

Date: August 3, 2011
To: Board of Deferred Compensation Administration
From: Staff
Subject: Plan Communications and Participant Focus Group
Volunteer Pool

*Board of Deferred
Compensation Administration
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Recommendation:

That the Board of Deferred Compensation Administration approve staff's proposal for soliciting Plan participant volunteers to serve on focus groups for Plan communication materials and other Plan administrative issues.

Discussion:

At its July 19, 2011 meeting, the Board approved a recommendation from staff to develop a volunteer pool of Plan participants interested in serving on focus groups for Plan communication materials and other Plan administrative issues. The Board directed staff at that time to return with a proposal with more specific details. After reviewing several options, staff is recommending the following:

- Establish a web-based application module which would allow Plan participants to submit their interest electronically using the Plan website.
- Provide primary notice to all Plan participants via the October, 2011 quarterly statement, with supplementary communication via email and a web posting.
- Create a specific window of time to apply, with a starting date of 10/17/11 and ending date of 11/11/11.
- Re-open the application window on an annual basis.

The web-based application module would use Great-West's on-line survey software. Applicants would be asked to provide certain basic demographic pieces of information that would be helpful for staff to be able to create demographically balanced focus groups, as discussed at the 07/19/11 meeting.

Notification would be provided via the 09/30/11 quarterly statement, which will be issued approximately the third week of October. Staff is recommending that the application window have prescribed beginning and ending dates. Based on prior experience, this approach should encourage greater response than if the application window is left open-ended. If the response is weak, this approach could be revisited. If the response is strong, staff would propose that the application window be re-opened on an annual basis.

As a modest incentive to and reward for participation, staff recommends that any individual who participates in a focus group be provided with a \$5 gift card. Staff is presently awaiting

confirmation from the City Attorney that the Plan's reserve fund with Great-West can be a funding source for gift cards.

Staff has developed draft language and questions that would be included on the website (see attachment). This information may be refined before the application window is opened.

Submitted by: _____
Steven Montagna

**City of Los Angeles
Volunteer Pool
Communications Focus Groups**

Dear Plan Participant,

One of the most important responsibilities of administering the City's Deferred Compensation Plan involves the development of Plan communication materials such as newsletters, special announcements, forms, and website communications. Our goal is to ensure that all of our communication materials are clear and easily understood.

To meet that goal, the Plan tests those materials wherever possible by convening "focus groups." Focus groups are small groups of 6-10 Plan participants who spend a brief amount of time reviewing a draft communication piece. Focus group members provide feedback regarding how successfully the draft explained the topic and how the document can be improved.

The City's Plan is interested in developing a pool of volunteer participants in the downtown Civic Center area to participate in focus groups on an as-needed basis. The groups, when convened, will last approximately 30 minutes to one hour. A \$___ gift card will be provided to any individual who participates in a focus group. Please be aware that participation is strictly voluntary and that any arrangements with your supervisor to participate in a group during the workday are outside the jurisdiction of the Plan. These focus groups will primarily address Plan communication materials but may occasionally consider other issues affecting the Plan.

If you would be interested in joining the volunteer pool, please complete the following application information. Applying does not obligate you to participate. However, your name will be added to our volunteer pool, and you may then periodically receive requests to participate in a focus group. Our window for collecting applications is open from _____ to _____.

We hope you will consider joining our Focus Group Volunteer Pool and helping us create excellent communication materials for Plan participants.

Focus Group Questionnaire

1. Are you currently a participant (meaning you have an account balance) with the City's Deferred Compensation Plan?
 Yes
 No

2. What is your estimated account balance?
 Less than \$10,000
 \$10,000 to \$25,000
 \$25,001 to \$50,000
 \$50,001 or more
 I don't know/not sure

3. What is your bi-weekly contribution amount?
- \$0
 - \$15-50
 - \$51-300
 - \$301 or more
 - I don't know/not sure
 - n/a (retired or separated from service)
4. Please indicate your age category.
- Under 30
 - 30 to 39
 - 40 to 49
 - 50 to 59
 - 60 or over
5. Please indicate your current retirement plan membership.
- Los Angeles City Employees' Retirement System
 - Department of Water and Power Retirement System
 - Fire & Police Pensions
6. With what City department are you currently employed?
- Retired or otherwise no longer work for the City
 - Airports
 - Animal Services
 - Building and Safety
 - Chief Legislative Analyst
 - City Administrative Office
 - City Attorney
 - City Clerk
 - City Council
 - Community Development
 - Controller
 - DOT
 - DWP
 - Fire
 - Fire/Police Pensions
 - General Services
 - Harbor
 - Housing
 - ITA
 - LACERS
 - Library
 - Mayor's Office
 - Personnel
 - Planning
 - Police
 - Public Works
 - Recreation & Parks
 - Treasurer/Finance
 - Zoo
 - Other

7. Please indicate your general employment category
- Service & Maintenance
 - Skilled Craft
 - Clerical
 - Management
 - Fire or Police sworn
 - n/a (retired or separated from service)
8. Please indicate the number of years you have worked full-time with the City:
- 0-5
 - 6-15
 - 16-25
 - 25 or over
 - n/a (retired or separated from service)
9. Please indicate the number of years you currently estimate you will continue working with the City
- 0-5
 - 6-15
 - 16-25
 - 25 or over
 - n/a (retired or separated from service)
10. Please indicate the general area of your work location (or, if retired, residence)
- Civic Center
 - Non-Civic Center
11. Please provide your contact information:
Daytime Phone: _____
Email Address: _____